EXHIBIT 2

COMMONWEALTH OF VIRGINIA



NORFOLK CIRCUIT COURT Civil Division 150 ST. PAUL'S BLVD 7TH FLOOR NORFOLK VA 23510 (757) 389-8942

Summons

To: VISION GOVERNMENT SOLUTIONS C/O CORPORATION SERVICE **COMPANY REGISTERED AGENT** 100 SHOCKOE SLIP FL 2 **RICHMOND VA 23219-4100**

Case No. 710CL25001916-00

The party upon whom this summons and the attached complaint are served is hereby notified that unless within 21 days after such service, response is made by filing in the clerk's office of this court a pleading in writing, in proper legal form, the allegations and charges may be taken as admitted and the court may enter an order, judgment, or decree against such party either by default or after hearing evidence.

Appearance in person is not required by this summons.

Done in the name of the Commonwealth of Virginia on, Tuesday, March 11, 2025

Clerk of Court: GEORGE E. SCHAEFER III

Instructions:

Hearing Official:

Attorney's name:

VIRGINIA: IN THE CIRCUIT COURT FOR THE CITY OF NORFOLK

CITY OF NORFOLK, VIRGINIA,

Plaintiff,

t iaimum,

Civil Case No.: 25-19 16

VISION GOVERNMENT SOLUTIONS, INC.,

Defendant.

SERVE:

v.

Vision Government Solutions, Inc. c/o CORPORATION SERVICE COMPANY, REGISTERED AGENT 100 Shockoe Slip Fl 2 Richmond, VA 23219-4100

COMPLAINT

Plaintiff, the City of Norfolk ("City"), by counsel, for its Complaint against the Defendant,

Vision Government Solutions, Inc. ("Vision"), herein respectfully states as follows:

INTRODUCTORY STATEMENT

1. This is an action for, among other things, breach of contract arising from the City's Contract No. 9230-0-2022 between the City and Vision whereby the City purchased Computer Assisted Mass Appraisal ("CAMA") software, services, and support from Vision. Vision represented to the City that it would provide a functional CAMA system that would meet the needs of the City's Office of the Real Estate Assessor. Based on Vision's representations, the City agreed to pay \$1,121,923 to Vision for Vision's CAMA software and services. After over 2 years as well as the payment of over \$849,000 to Vision, Vision failed to provide a functional CAMA system as contracted by the two parties.

PARTIES

- 2. Plaintiff, the City of Norfolk, is organized as a municipal corporation and body politic, chartered by and under the laws of the Commonwealth of Virginia.
- 3. On information and belief, Defendant, Vision Government Solutions, Inc., is a corporation chartered under the laws of the Commonwealth of Massachusetts authorized to transact and doing business in Virginia. Vision claims it is in the business of building and selling CAMA software for use by assessors.

JURISDICTION AND VENUE

- 4. The Court has jurisdiction over this action under § 17.1-513 of the Code of Virginia, 1950, as amended ("Virginia Code").
 - 5. Venue is proper in this Court pursuant to Virginia Code § 8.01-262.

FACTS COMMON TO ALL COUNTS

- 6. The City's Office of the Real Estate Assessor ("REA") determines the assessed value of all taxable property in the City.
- 7. The property tax is governed by Chapter 24 of the Norfolk City Code and the Title 58.1 of the Code of Virginia. Under these requirements the City is required to conduct a reassessment of real property (land, buildings, and other improvements) every year, as well as quarterly assessments.
- 8. In late 2021, the City desired to obtain new, updated CAMA Software and supporting services for the REA that would meet the REA's needs. Up until that point, the REA had used software originally obtained from a vendor in the 1990s ("legacy software").
- 9. The City's then-in-use legacy software did not allow for appraisal of parcels for quarterly assessments while allowing a future year reassessment simultaneously. The legacy

software required the REA to take several additional steps to accurately capture the value on the quarterly assessments, and then several more steps to get the certified annual assessment value. Using the legacy software, REA staff had to manually modify and recalculate the updated records if a new cost table was present. Resolving this inefficiency was the main purpose in the City seeking out new, updated CAMA Software for use by the REA.

- 10. On November 1, 2021, the City issued a Request for Proposals 9230-0-2022 for Computer-Assisted Mass Appraisal ("CAMA") and Land Records Management Software (the "RFP").
- 11. The RFP specified the required features and functionalities of the software system the City sought to procure, including that the selected vendor shall incorporate quarterly and annual reassessments as well as land records management into a single unified system that would also allow for the import and storage of historical data from the current system. As stated in the RFP, the acquired system must have the ability to provide multiple valuation tables, enabling updating of parcel records for both the quarterly supplemental assessment as well as annual reassessment activities for the upcoming year. Specifically, the system must be able to read separate valuation tables for current-year quarterly supplemental assessments as well as future valuation tables for the following year reassessment.
 - 12. The RFP included requirements for additional module capabilities.
 - 13. Vision submitted a proposal in response to the City's RFP on December 13, 2021.
- 14. In its proposal, Vision represented to the City that it would provide software and support services that would meet the City's needs as specified in the RFP. Specifically, Vision stated that its proposed CAMA software system allowed for the appraisal of parcels for quarterly reassessment while allowing a future year reassessment simultaneously. Vision stated that its

- 15. Vision's proposal in response to the RFP further stated that its CAMA software met the other required functionalities specified in the RFP, including additional module capabilities.
- 16. Vision stated it was confident it could meet "and significantly exceed" the City's desired Go-Live date of July 1, 2023. Vision stated that "[s]hould a contract be executed by March 2022, Vision could be ready to deploy as early as the end of the 2022 calendar year." *See* Ex.1, Exhibit E to the Agreement (Contractor's Proposal), p.5.
- 17. Vision described its CAMA software system as enabling "deep levels of personalization and configuration within [its] Commercial Off-the-Shelf system, reducing costly and risk[y] software development while still enabling the [City] to customize its workflows through the system." *Id*.
- 18. Based on the contents of Vision's proposal and Vision's representations regarding its CAMA software and services therein, the City entered into Contract No. 9230-0-2022 with Vision on or around March 28, 2022 (the "Contract"). See Ex. 1.
- 19. The Contract incorporated Vision's proposal in response to the RFP and the terms and conditions of the RFP.
- 20. The City paid to Vision \$687,000 in implementation costs for Vision's initial installation of its CAMA software and conversion of REA's data to same.
- 21. The Contract included a Statement of Work which included a Project Schedule outlining date milestones for conversion of the REA's data into Vision's software and a "Project

Go-Live" date by which the REA would be able to fully use Vision's software for assessment purposes.

- 22. Vision installed an initial Beta version of Vision's software on REA's computer system in June, 2022 and thereafter conducted a conversion of the REA's data from its legacy software to Vision's system.
- 23. Vision then installed its CAMA software, version "Vision 8.2," on the REA's computer system in August, 2022.
- 24. Almost immediately after Vision's installation of Vision 8.2, Vision's Project Schedule began to slip due to data conversion issues and software errors and omissions.
- 25. It was immediately apparent from the initial installation of Vision 8.2 that the key feature the City had bargained for allowing for the appraisal of parcels for quarterly reassessment while allowing a future year reassessment simultaneously (hereinafter "quarterly supplements feature") was absent from Vision 8.2.
- 26. After installation of Vision 8.2, when it was apparent the quarterly supplements feature did not exist in the CAMA software Vision provided, Vision represented to the City that it would provide such function in a new version of software that Vision was developing, "Vision 8,3".
- 27. Vision offered no firm date by which it would supply Vision 8.3 or would otherwise provide the City with the quarterly supplements feature that the City had explicitly contracted for.
- 28. In the meantime, the installed version of Vision 8.2 was completely inoperable due to Vision's errors in conversion and errors and omissions in the software.

- 29. Conversion errors and software errors persisted throughout 2022, and included, but were not limited to: data missing for account information, construction details, permits, sketches and transfers; overrides of calculations regarding outbuildings; and incorrect assessment of all parcels with multiple sections.
- 30. The City timely alerted Vision to all of these errors and omissions, but Vision failed to timely address such issues.
- 31. Further, Vision did not deliver Vision 8.3 in 2022 or otherwise provide the City with the quarterly supplements feature that the City had explicitly contracted for and Vision had agreed to provide.
- 32. Due to the aforementioned issues, errors, and omissions in the Vision 8.2 software and conversion, by November, 2022, Vision 8.2 was still inoperable and the REA could not Go-Live with Vision's system in time to complete the upcoming annual assessments for 2023.
- 33. As a result, the REA was forced to conduct the annual assessment for 2023 using the City's legacy software.
- 34. The REA's use of the City's legacy software to complete the annual assessments for 2023 meant the City had to continue paying a software maintenance fee to the City's legacy software provider, in addition to paying software maintenance and cloud hosting fees to Vision.
- 35. The maintenance fee the City paid to its legacy software vendor for Year 1 (FY 2022-23) amounted to \$30,014.
- 36. Pursuant to the Contract, the software maintenance fee the City paid Vision for Year 1 (FY 2022-23) amounted to \$4,750 and the cloud hosting fee the City paid Vision for Year 1 (FY 2022-23) amounted to \$24,750.

- 37. The City continued to work with Vision to achieve a Go-Live of Vision's software throughout late 2022 and into 2023.
- Still, Vision's software system continued to present errors and omissions such that 38. the system could not Go-Live.
- Such errors and omissions included, but were not limited to: improvements were 39. placed on overrides to match original values from the City's legacy software rather than Vision's software properly calculating such values; faulty and missing imports of sketches; particular exports not functioning such as Red2 and PCI Tax Export; no functioning abatement system; problems with sales validity codes; discrepancy in data conversion of effective year in outbuildings; parcels missing construction details; incorrect dropdowns and data; double assessment of outbuildings; Reason for Change function for tracking value changes not working properly; permit import malfunctioning; commercial properties not being priced; and incorrect conversion of living space.
- 40. The City timely alerted Vision to all of these errors and omissions, but Vision failed to timely address such issues.
- 41. Several of the errors in Vision 8.2 and in conversion resulted in City staff having to conduct additional, laborious manual reviews and corrections of data.
- In February, 2023, the City had to hire an outside consultant to correct valuation 42. issues with Vision's software, incurring further costs.
- 43. Further, by May, 2023 Vision still had not delivered Vision 8.3 or otherwise provided the City with the quarterly supplements feature that the City had explicitly contracted for and Vision had agreed to provide.

- 44. In June, 2023 Vision provided Vision 8.3 and began testing this new version of its software with the City.
 - 45. In July, 2023 Vision installed Vision 8.3 on the REA's computer system.
- 46. Immediately, Vision 8.3 presented errors and omissions, including, but not limited to: issues saving parcels; continued issues with Reason for Change function; properties with different sections converted with incorrect fixture and bedroom counts; doubling of land value; GIS not working properly; issues with subdividing parcels; permit import not working; no ability to run reports; and error messages preventing regular input.
- 47. Vision 8.3 had not addressed various errors and omissions in Vision 8.2 and in fact contained even more errors and omissions.
- 48. Vision attempted to fix the aforementioned errors and omissions by building and installing yet another version of its software, "Vision 8.3.0.4" in August, 2023.
- 49. In late August, 2023, the City's Real Estate Assessor, William Rodda, and Chief Deputy Real Estate Assessor, Elizabeth White, met with Vision's Chief Executive Officer, Paul Smith, Vision's Chief Operating Officer, Katryna Cadle, and Vision Senior Manager of Software Implementation, Cate Courtney at a conference in Salt Lake City to discuss the ongoing problems with Vision's software and a timeline to fix the issues.
- 50. Errors and omissions persisted in Vision 8.3 through August and September, 2023, including, but not limited to: incorrect conversion of extra features; errors saving parcels; crashing; more issues with the Reason for Change function; incorrect import of 1st Quarter and Partial 2023 permits values; error messages; double supplemental posting; no assessment correction process; condo workflow issues; copy parcel utility issues; and conversion error regarding valuing parcels with wrong value tables associated.

- 51. Vision had attempted to provide the quarterly supplements feature that it originally represented it would provide in 2022 through Vision 8.3. However, as late as October, 2023, the quarterly supplements feature Vision had attempted to provide with Vision 8.3 was not functioning properly.
- 52. Further errors and omissions persisted with Vision 8.3 in October and November of 2023, including, but not limited to: continued errors with exports; and sales analysis extract report not working.
- 53. On October 18, 2023, Rodda met with Paul Smith, Vision Vice President, David Hickman, and Cate Courtney at a Virginia Association of Assessing Officers conference at which Paul Smith admitted, "We gave you a crappy conversion and software that doesn't work."
- 54. On November 16, 2023 Vision attempted to address the continuing errors and omissions with its software with a newly built version "Vision 8.3.0.5."
- 55. This newest version of Vision's software once again failed to address previous errors and created new ones.
- 56. Errors and omissions that presented with Vision 8.3.0.5 included, but were not limited to: RED 2 export problems; new error messages; conversion and application issue regarding land details—square footage not working properly; save data error; update data error; no image component error in GIS; and conversion of property class codes creating issues with residential versus commercial pricing tables.
- 57. Errors and conversion issues with Vision 8.3.0.5 resulted in City staff having to conduct additional, laborious manual reviews and corrections of data.
- 58. By November, 2023 due to the aforementioned issues, errors, and omissions in the Vision 8.3 software and conversion, Vision's software was still inoperable and the REA could

not Go-Live with Vision's system in time to complete the upcoming annual assessments for 2024.

- 59. Further, the quarterly supplements feature Vision had attempted to provide in its newly built Vision 8.3 did not function properly.
- 60. Vision additionally acknowledged a faulty double assessment problem created by Vision 8.3 whereby a massive but unknown amount of parcels were posted with double assessments that were inaccurate. Vision's proposed solution to this problem to extract all the supplemental data from Vision's software and re-insert data from the City's legacy software was unreasonable.
- 61. As a result, the REA was forced to conduct the annual assessment for 2024 using the City's legacy software.
- 62. This was the second assessment year in a row the City was unable to use Vision's system because such software was riddled with errors, omissions, and failed to comply with the specifications of the Contract.
- 63. The REA's use of the City's legacy software to complete the annual assessments for 2024 meant the City had to continue paying a software maintenance fee to the City's legacy software provider, in addition to paying software maintenance and cloud hosting fees to Vision.
- 64. The maintenance fee the City paid to its legacy software vendor for Year 2 (FY 2023-24) amounted to \$31,815.
- 65. Pursuant to the Contract, the software maintenance fee the City paid Vision for Year 2 (FY 2023-24) amounted to \$57,215 and the cloud hosting fee the City paid Vision for Year 2 (FY 2023-24) amounted to \$25,864.

- 66. The City continued to work with Vision to achieve a Go-Live of Vision's software through early 2024.
- 67. Vision presented versions Vision 8.3.0.8 in January, 2024 and Vision 8.3.0.9 in March, 2024, however these versions of Vision's software did not resolve outstanding errors and omissions in order for the City to Go-Live with Vision's system
- 68. Throughout the relevant time period, the City timely and reasonably provided all requested information and support to Vision in an attempt to achieve a Go-Live of Vision's software.
- 69. Due to Vision's failure to provide the City with a functioning CAMA software system in compliance with the Contract, the City terminated its contract with Vision on or around April 24, 2024.
- 70. Despite having over 18 months since initial installation to do so and the City expending \$849,579 in payment to Vision, Vision failed to provide the City with a functioning CAMA software system in compliance with the Contract.

COUNT I - BREACH OF CONTRACT

- 71. The City incorporates by reference the foregoing paragraphs as if fully set forth herein.
- 72. The City and Vision entered into a binding and enforceable agreement regarding the purchase of CAMA software and services that was agreed upon in the Contract, including exhibits thereto.
- 73. Pursuant to its agreement with the City, Vision agreed that it would deliver and provide the City with a fully functional CAMA software system in compliance with the specifications of the Contract.

- 74. The City performed its obligations under the Contract.
- 75. Vision breached its agreement with the City by failing to deliver and provide the City with a fully functional CAMA software as bargained for by the City.
- 76. Vision also breached its covenant of good faith and fair dealing by, among other things, falsely, fraudulently, or negligently misrepresenting to the City that Vision's software had features or functionalities that Vision knew or should have known did not exist in Vision's software.
- 77. Vision made misrepresentations to the City to induce the City to pay and continue making payments to Vision.
- 78. Vision failed to perform its obligations under the Contract despite repeated demands by the City for Vision's performance under the Contract. Despite payments by the City of \$849,579 to Vision, Vison failed to deliver to the City the bargained for fully functional CAMA software system.
- 79. The City has suffered damages as a direct and proximate result of Vision's breach.

 The City's damages include direct, indirect, special, incidental and consequential damages.

COUNT II - BREACH OF EXPRESS WARRANTY (SERVICES)

- 80. The City incorporates by reference the foregoing paragraphs as if fully set forth herein.
- 81. Vision warranted to the City that services provided by Vision pursuant to the Contract would be performed in a professional and workmanlike manner, consistent with then-current industry standards.
- 82. Vision's conversion of the REA's data to Vison's software contained errors and omissions that Vision failed to correct.

- 83. Vision provided software with persistent errors and omissions that Vision failed to correct.
- 84. Vision's attempts to correct persistent errors and omissions in Vision's software failed on numerous occasions and in some instances created new errors and omissions.
- 85. The length of time Vision took to correct or attempt to correct persistent errors and omissions in Vision's software and with data conversion was unreasonable.
- 86. Vision failed to perform its services under the Contract skillfully, carefully, diligently, and in a workmanlike manner.
- 87. Vision's failure to perform its services as warranted resulted in City personnel having to conduct several laborious clean-up reviews and projects regarding incorrect data.
- 88. The City notified Vision of its defective services within a reasonable amount of time upon discovery.
- 89. Any limitation on the City's remedies for Vision's breach of its express warranty has failed of its essential purpose.
- 90. As a direct result of Vision's breach of express warranty, the City has suffered damages, including direct, indirect, special, incidental and consequential damages.

COUNT III – BREACH OF IMPLIED WARRANTY OF MERCHANTABILITY

- 91. The City incorporates by reference the foregoing paragraphs as if fully set forth herein.
- 92. Vision is a company in the business of building and selling CAMA software for use by assessors.
 - 93. Vision sold its CAMA software system to the City per the Contract.

- 94. Vision's CAMA software as sold to the City would not pass without objection in the trade under the Contract description.
- 95. Vision's CAMA software as sold to the City was unfit for the ordinary purpose for which CAMA software is used.
- 96. As a direct result of Vision's breach of its implied warranty of merchantability, the City has suffered damages, including direct, indirect, special, incidental and consequential damages.

COUNT IV – BREACH OF IMPLIED WARRANTY OF FITNESS FOR A PARTICULAR PURPOSE

- 97. The City incorporates by reference the foregoing paragraphs as if fully set forth herein.
- 98. At the time Vision entered into the Contract with the City, it had reason to know the particular purpose for which the City was requiring Vision's CAMA software.
- 99. The particular purpose, including, but not limited to, the quarterly supplements feature, was known to Vision through the RFP and acknowledged by Vision in its response to the RFP, which response was incorporated into the Contract.
- 100. The City relied on Vision's represented skill and judgement to furnish CAMA software suitable to the City's particular purpose.
- 101. The CAMA software Vision provided to the City lacked the quarterly supplements feature, among other software defects and omissions, such that it was not fit for the particular purpose the City required at the time of purchase.
- 102. As a direct result of Vision's breach of its implied warranty of fitness for a particular purpose, the City has suffered damages, including direct, indirect, special, incidental and consequential damages.

COUNT V - FRAUD IN THE INDUCEMENT

- 103. The City incorporates by reference the foregoing paragraphs as if fully set forth herein.
- 104. The representations made by Vision in its proposal on or around December 13, 2021 that its CAMA software met the specifications required by the City as outlined in its RFP, including Vision's specific representation that its CAMA software included the quarterly supplements feature, constituted assertions of false and material facts.
- 105. Vision knew such representations were false at the time it made such representations to the City, or such representations were made with reckless disregard for the truth of the matters stated.
- 106. After initial delivery and installation of Vision's software on the REA's computer system, Vision stated that the quarterly supplements feature would be forthcoming in a later to-be-built version of its software. This admission establishes that Vision knew or should have known its software lacked the quarterly supplements feature at the time Vision submitted its proposal in response to the RFP, and therefore Vision's representation in its proposal that its software included the quarterly supplements function was knowingly false at the time it was made.
- 107. Vision intended to deceive the City by making the aforementioned false representations at the time of its proposal.
 - 108. Vision made such false representations willfully, deliberately, and wantonly.
- 109. The City relied on Vision's false representations and was induced by them to enter into the Contract.

- 110. Vision knowingly, willfully, deliberately, and wantonly continued to make false representations regarding the capabilities and functionalities of its CAMA software after delivery and installation to induce the City into continuing making payment to Vision under the Contract.
- 111. As a direct and proximate result of Vision's false representations of material facts, the City has suffered damages, including direct, indirect, special, incidental and consequential damages.

WHEREFORE, the City respectfully requests this Court enter judgment in its favor, such judgment including:

- A. Compensatory damages in an amount in excess of \$849,579.00 as to be determined by a jury.
- B. Consequential or incidental damages in an amount in excess of \$91,269.00 as to be determined by a jury for all necessary, probable, or natural consequences of Vision's breach of the Contract, including, without limitation, all consulting or contractor fees, service fees, maintenance fees, the value of time expended by City personnel working toward a Go-Live of Vision's software, and any other consequential or incidental costs or expenses incurred by the City.
- C. In the alternative to direct damages resulting from Vision's breach of contract, an accounting of all monies received by Vision from the City arising out of or in relation to the Contract or Vision's software and services, and a disgorgement to the City of same, reasonably believed to be in an amount in excess of \$849,579.00.
 - D. Punitive damages of \$350,000.00.
 - E. Such further relief as the Court may deem just and proper.

TRIAL BY JURY IS DEMANDED.

CITY OF NORFOLK,

Of Counsel

Karla J. Soloria (VSB 82674), Assistant City Attorney Bernard A. Pishko, City Attorney City of Norfolk Department of Law 810 Union Street, Suite 900 Norfolk, VA 23510 karla.soloria@norfolk.gov

Telephone: (757) 664-4529 Facsimile: (757) 664-4201

Counsel for Plaintiff

COVER SHEET FOR FILING COMMONWEALTH OF VIRGINIA	VIL ACTIONS Case	Case No. (CLERK'S OFFICE USE ONLY)			
	Norfolk				
City of Norfolk		·			
PLAINTIFF(S)	vJIn re:Vi	DEFENDANT(S)			
		reby notify the Clerk of Court that I am filing e claim being asserted or relief sought.)			
GENERAL CIVIL Subsequent Actions [] Claim Impleading Third Party Defendant	ADMINISTRATIVE LAW [] Appeal/Judicial Review of Decision of (select one) [] ABC Board	PROBATE/WILLS AND TRUSTS [] Accounting [] Aid and Guidance [] A project (select one)			
[] Monetary Damages [] No Monetary Damages [] Counterclaim [] Monetary Damages [] No Monetary Damages [] Cross Claim [] Interpleader [] Reinstatement (other than divorce or driving privileges) [] Removal of Case to Federal Court	[] ABC Board [] Board of Zoning [] Compensation Board [] DMV License Suspension [] Employee Grievance Decision [] Employment Commission [] Local Government [] Marine Resources Commission [] School Board [] Voter Registration	[] Appointment (select one) [] Guardian/Conservator [] Standby Guardian/Conservator [] Trust (select one) [] Impress/Declare [] Reformation [] Will (select one) [] Construe [] Contested			
Business & Contract [] Attachment [] Confessed Judgment [] Contract Action [] Contract Specific Performance [] Detinue	Other Administrative Appeal DOMESTIC/FAMILY [] Adoption [] Adoption – Foreign	MISCELLANEOUS [] Appointment (select one) [] Church Trustee [] Conservator of Peace [] Marriage Celebrant			
[] Garnishment Property [] Annexation [] Condemnation [] Ejectment [] Encumber/Sell Real Estate	[] Adult Protection [] Annulment [] Annulment — Counterclaim/Responsiv Pleading [] Child Abuse and Neglect — Unfounded Complaint [] Civil Contempt	[] Bond Forfeiture Appeal [] Declaratory Judgment ve [] Declare Death [] Driving Privileges (select one) [] Reinstatement pursuant to § 46,2-427 [] Restoration — Habitual Offender or 3 rd Offense			
[] Enforce Vendor's Lien [] Escheatment [] Establish Boundaries [] Landlord/Tenant [] Unlawful Detainer [] Mechanics Lien	[] Divorce (select one) [] Complaint Contested* [] Complaint Uncontested* [] Counterclaim/Responsive Pleading [] Reinstatement Custody/Visitation/Support/Equitable	[] Expungement [] Firearms Rights – Restoration [] Forfeiture of U.S. Currency [] Freedom of Information [] Injunction [] Interdiction			
[] Partition [] Quiet Title [] Termination of Mineral Rights Tort [] Asbestos Litigation	Distribution [] Separate Maintenance [] Separate Maintenance Counterclaim WRITS	[] Interrogatory [] Judgment Lien-Bill to Enforce [] Law Enforcement/Public Official Petition [] Name Change [] Referendum Elections			
[] Compromise Settlement [] Intentional Tort [] Medical Malpractice [] Motor Vehicle Tort [] Product Liability	[] Certiorari [] Habeas Corpus [] Mandamus [] Prohibition [] Quo Warranto	[] Sever Order [] Taxes (select one) [] Correct Erroneous State/Local [] Delinquent [] Vehicle Confiscation			
[] Wrongful Death [] Other General Tort Liability		[] Voting Rights – Restoration [] Other (please specify)			
[X] Damages in the amount of \$ 1,290,848.00	are claimed.	Ul.			
March 10, 2025	[]PLAINTIFF []DEFENDAME	M ATTORNEY FOR M PLAINTIFF			
DATE	[]FLAMITER ([]DEFENDAMEN	[] DEFENDANT			
Karla J. Soloria PRINT NAME 810 Union St., Suite 900 Norfolk, VA 2 ADDRESS/TELEPHONE NUMBER OF	23510 (757) 664-4529 dispute: groun child custody or debt allocated custody and the custody of debt allocated custody and the custody are designed custody.	*"Contested" divorce means any of the following matters are in dispute: grounds of divorce, spousal support and maintenance, child custody and/or visitation, child support, property distribution or debt allocation. An "Uncontested" divorce is filed on no fault grounds and none of the above issues are in dispute.			

CONTRACT NO. 9230-0-2022

AGREEMENT BY AND BETWEEN THE CITY OF NORFOLK AND VISION GOVERNMENT SOLUTIONS, INC.

THIS AGREEMENT by and between the CITY OF NORFOLK, Virginia (the "City") and VISION GOVERNMENT SOLUTIONS, INC. (the "Contractor"), a corporation authorized to conduct business in the Commonwealth of Virginia whose address is 1 Cabot Road, Suite 100, Hudson, MA 01749.

WHEREAS, the City issued RFP no. 9230-0-2022 on November 1, 2021 seeking Computer Assisted Mass Appraisal (CAMA) and Land Records management software, services, and support; and

WHEREAS, Contractor submitted its proposal on December 13, 2021, which proposal was determined by the City to be most advantageous; and

WHEREAS, the City desires to purchase CAMA software, services and support from Contractor subject to the following negotiated terms and conditions; now, therefore,

WITNESSETH:

For and in consideration of the promises set forth herein and other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the City and Contractor hereby agree to the following terms and conditions in this Agreement. including the following documents, which are hereto attached and incorporated herein:

- 1. Master Software License and Services Agreement (Exhibit A).
- 2. CAMA Statement of Work (Exhibit B)
- 3. Software Maintenance Services Schedule (Exhibit C)
- 4. Cloud Services Schedule (Exhibit D)
- 5. Contractor's Proposal (Exhibit E)
- 6. RFP (Exhibit F)

In the event of any inconsistency between the documents comprising this Agreement, the order of precedence shall be as follows:

- 1. This Agreement
- 2. Exhibit A
- 3. Exhibit B
- 4. Exhibit C
- 5. Exhibit D
- 6. Exhibit E

7. Exhibit F

1) SCOPE OF SERVICES

Contractor shall provide CAMA software services and support in accordance with the terms and specifications set forth in Exhibits A-F.

2) ADMINISTRATION AND MANAGEMENT

The City's Office of the Real Estate Assessor shall be responsible for administration and management of this Agreement.

3) TERM

The term of this Agreement shall commence immediately and end on March 31, 2027. The City in its sole discretion may renew this Agreement for an additional period or periods totaling not more than five (5) years on such terms and conditions as the parties may negotiate.

4) COMPENSATION AND CERTIFICATION OF FUNDS

The City will pay to Contractor an amount not to exceed One Million, One Hundred Twenty-One Thousand, Nine Hundred Twenty-Three and 00/100 Dollars (\$1,121,923.00) for software, licenses, support, and services provided under this Agreement as follows:

	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Implementation	\$687,000	-	-	_	-	\$687,000
Software	\$54,750	\$57,215	\$59,788	\$62,479	\$65,290	\$299,522
Cloud Hosting	\$24,750	\$25,864	\$27,028	\$28,244	\$29,515	\$135,401
Total	\$766,500	\$83,079	86,816	90,723	94,805	\$1,121,923

Years 3 through 5 pricing are Budgetary Estimates and subject to change in line with Visioo's most current list pricing with 90 days prior notice, not to exceed 10%. Compensation pursuant to performance under this Agreement shall be subject to appropriation by the Council of the City of Norfolk. The City shall not incur any obligation or liability under this Agreement beyond the funds appropriated for such obligation or liability in any fiscal year in which this Agreement is in effect. Funds are certified for the initial term of this Agreement. Additional purchases will require amendment of this Agreement and further certification of funds. The City Council of the City of Norfolk retains the discretion at all times to appropriate all City funds. The City shall not incur any obligation or liability under this Agreement beyond the funds appropriated for such obligation or liability in any fiscal year in which this Agreement is in effect. If funds are not appropriated in advance of any fiscal year during which this Agreement remains in effect, the City may cancel the Agreement without incurring any liability and/or damages

of any type to the Contractor unless otherwise provided for in Exhibits A-F.

Document 1-2

5) SUBCONTRACTORS; PAYMENT OF SUBCONTRACTORS

Contractor's use of subcontractors and the work they are to perform must receive written approval from the City at least five (5) calendar days prior to the work being performed. Contractor shall be solely responsible for the liability of subcontractors for the types and limits required of Contractor herein.

The Contractor is obligated to take one of the two following actions within seven (7) days after receipt of amounts paid to the Contractor by the City for work performed by any subcontractor under this Agreement:

- a. Pay the subcontractor for the proportionate share of the total payment received from the City attributable to the work performed by the subcontractor under this Agreement; or
- b. Notify the City and the subcontractor, in writing, of the Contractor's intention to withhold all or a part of the subcontractor's payment with the reason for nonpayment.

The Contractor is obligated to pay interest to the subcontractor on all amounts owed by the Contractor to the subcontractor that remain unpaid after seven (7) days following receipt by the Contractor of payment from the City for work performed by the subcontractor under this Agreement, except for amounts withheld as allowed in subsection b., above. Unless otherwise provided under the terms of this Agreement, interest shall accrue at the rate of one percent (1%) per month.

The Contractor shall include in each of its subcontracts, if any are permitted, a provision requiring each subcontractor to include or otherwise be subject to the same payment and interest requirements with respect to each lower-tier subcontractor.

The Contractor's obligation to pay an interest charge to a subcontractor pursuant to this section may not be construed to be an obligation of the City. A Contract modification or Amendment to this Agreement may not be made for the purpose of providing reimbursement for such interest charge. A cost reimbursement claim may not include any amount for reimbursement for such interest charge.

6) **INDEMNIFICATION**

Paragraph Deleted.

ASSIGNMENT PROHIBITED 7)

Contractor shall not assign, transfer, subcontract, or otherwise dispose of its rights or duties under this Agreement to any other person, firm, partnership, company, or corporation without the previous consent in writing of the City.

8) **NOTICES**

All notices, requests, demands, and other communications required or permitted under this Agreement shall be in writing and shall be deemed to have been duly made when received by U.S. Mail or hand-delivery. Notice shall be made to the Contractor at is business address identified above.

Notices to the City shall be addressed as follows: City Manager City of Norfolk 1101 City Hall Building 810 Union Street Norfolk, Virginia 23510

With a copy to:

City Attorney City of Norfolk 900 City Hall Building 810 Union Street Norfolk, VA 23510

9) INDEPENDENT CONTRACTOR

Contractor shall at all times act as an independent contractor in the performance of this Agreement. Neither Contractor nor its employees or agents shall represent themselves to be, or be deemed to be, employees of the City.

10) **SEVERABILITY**

If any provisions of this Agreement are held to be unenforceable, this Agreement shall be construed without such provisions.

11) WAIVER

The failure by a party to exercise any right hereunder shall not operate as a waiver of such party's right to exercise such right or any other right in the future.

12) **CHANGES**

This Agreement may be amended only by a written document executed by a duly authorized representative of each of the parties.

GOVERNING LAW AND VENUE 13)

Document 1-2

14) ETHICS IN PUBLIC CONTRACTING

Contractor hereby certifies that it has familiarized itself with §§33.1-86 through 33.1-93 of the Code of the City of Norfolk, Virginia, 1979, as amended, entitled "Ethics in Public Contracting," and further that all amounts received by Contractor, pursuant to this Agreement are proper and in accordance therewith.

15) NONDISCRIMINATION

In the performance of this Agreement, Contractor agrees that it will adhere to the nondiscrimination requirements set forth in §33.1-53 of the Code of the City of Norfolk, Virginia, 1979, as amended.

COMPLIANCE WITH FEDERAL IMMIGRATION LAW 16)

At all times during which any term of this Agreement is in effect, Contractor does not and shall not knowingly employ any unauthorized alien. For purposes of this section, an "unauthorized alien" shall mean any alien who is neither lawfully admitted for permanent residence in the United States nor authorized to be employed by either Title 8, section 1324a of the United States Code or the U.S. Attorney General.

AUTHORIZATION TO TRANSACT BUSINESS IN THE 17) . COMMONWEALTH

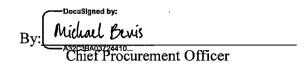
Contractor hereby represents that it is organized as a stock or non-stock corporation, limited liability company, business trust, or limited partnership or registered as a registered limited liability partnership and is authorized to transact business in the Commonwealth as a domestic or foreign business entity if so required by Title 13.1 or Title 50 or as otherwise required by law.

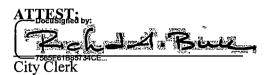
IN WITNESS WHEREOF, the City and Contractor have caused their duly authorized officials to execute this Agreement.

VISION GOVERNMENT SOLUTIONS, INC.

Diane Basile, (FO

CITY OF NORFOLK





CONTENTS APPROVED:

DocuSigned by:	
William Rodda	
City Assessor	

FORM & CORRECTNESS APPROVED:

DocuSigned by:	
att	
CD0705D05044472	
Deputy City Attorney	

CERTIFICATION OF FUNDING

I hereby certify that the money required for this Amendment to Agreement is in the City Treasury to the credit of the fund from which it is to be drawn and not appropriated for any other purpose.

Account No.: 4000-4-4295-5555-FY22 Amount <u>\$ \$1</u>,121,923.00 Contract #9230-VISION Vendor Code: vs0000006767 Business License #: _____

> 3/27/2022 | 1:36 PM EDT Director of Finance Date



MASTER SOFTWARE LICENSE AND SERVICES AGREEMENT

This Master Software License and Services Agreement ("Agreement") is made and entered by and between Vision Government Solutions, Inc., a Massachusetts corporation with its principal place of business at 1 Cabot Road, Hudson, Massachusetts 01749 ("Licensor" or "Vision") and the City of Norfolk, Virginia ("Licensee"). Licensor and Licensee may be collectively referred to as "Parties" or individually as a "Party."

WHEREAS, the Licensor has developed and owns, or has the right to use and/or license, certain software and related documentation that Licensee desires to use; and

WHEREAS, Licensor is willing to grant a license to Licensee to use, and Licensee desires to use, such software and related documentation, on the terms and subject to the conditions set forth herein.

NOW, THEREFORE, in consideration of the foregoing premises and of the conditions and mutual covenants contained herein, and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the Parties hereto agree as follows:

1 Definitions

- "Defect" shall mean reproducible errors in the Software which prevent the Software from performing in all material respects in accordance with the Documentation, when operated in the proper environment and used in accordance with all applicable instructions.
- "Designated Hardware" shall mean the central processing unit (CPU), local area network, or network server or other hardware specified or permitted by Vision designated by the Licensee and in compliance with any known required specifications, and if applicable, the number of users set forth on the applicable Schedule or other addendum attached hereto and made a part hereof. The Designated Hardware may include mobile devices and annexed hereto. "Documentation" shall mean the user documentation describing the Software and providing guidelines for its use, and any and all additions and updates thereto provided to Licensee by Licensor, and any portion of the foregoing.
- "Enhancement" shall mean collectively any modification. addition, or change to the Software that provides error corrections or efficiency alterations to the Software, designated as such in Licensor's sole discretion. Enhancements are provided by Licensor to Licensee under this Agreement and/or pursuant to an applicable Schedule or other addendum, without an additional charge as part of warranty or maintenance Services, provided that Licensee has not breached this or any other Agreement between Licensor and Licensee. Enhancements are delivered to the Licensee as part of a software release.
- "Installed Software" shall mean the specific Software being licensed to Licensee by Licensor as specified on any applicable Schedule, without regard to the method by which Licensee accesses such Software.
- "License" shall mean the license granted hereby to the Licensee by the Licensor for the Software.
- "Location" shall mean the permitted location for the Designated Hardware, as listed on the applicable Schedule(s) annexed hereto and made a part hereof.

- 1.7 "Module" shall mean a dependent software program that works with the Software but provides separate and optional functionality, which may be offered to Licensee for an additional charge.
- 1.8 "Person" shall mean any individual, partnership (general, limited or otherwise), limited liability company, corporation, joint venture, trust, trustee, unincorporated association, proprietorship or other legal entity, or any government, agency or subdivision thereof.
- 19 "Prices" shall mean the then-current list prices of Licensor for Software or Services. The price list in effect on the date of this Agreement may be annexed hereto as an applicable Schedule.
- 1.10 "Schedule" shall mean any additional document that is attached hereto, made a part hereof and incorporated into this Agreement by reference, that is executed by both Parties.
- 1.11 "Services" shall mean all the conversion, support, update, modification, installation, implementation, maintenance, consulting, training or other services provided to Licensee by Licensor or any designee of Licensor, pursuant to this Agreement and any applicable Schedule.
- 1.12 "Software" shall mean the Installed Software and any and all Enhancements and Upgrades, custom and other software hereafter provided to or obtained by Licensee pursuant to this Agreement, any other agreement between Licensee and Licensor, whether in object code, source code or any other form, and any portion of the foregoing. The Software may be further defined in any applicable Statement of Work.
- 1.13 "Statement of Work" shall mean a specific type of Schedule that specifies, among other things, the Software and Services being purchased and/or licensed by Licensee, and the number of users authorized to use the Software.
- 1.14 "Upgrade" shall mean collectively any significant modifications or changes to the Software which provides new or different functionality and/or interoperability, designated as such in Licensor's sole discretion as a new software version. Upgrades are provided by Licensor to Licensee pursuant to an applicable

- Schedule. Licensor allocates or charges separate or additional 2.5 consideration for Upgrades.
- 1.15 "Warranty Period" shall mean the 30-day period from the later of shipment or delivery to Licensee of the Installed Software, unless a different period is specified on an applicable Statement of Work regarding such Installed Software.

License Grant and Restrictions

- General. The Licensor represents that it has the right to grant the License hereunder. The Installed Software and its related Documentation are licensed, not sold, to Licensee for use only under the terms of this Agreement.
- 2.2 License Grant. Upon and subject to the terms and conditions of this Agreement, Licensor grants to Licensee, and Licensee accepts, a non-transferable, limited, non-exclusive license to: (i) use the Installed Software in object code form as limited below and by any applicable Schedule; (ii) use the Installed Software only for Licensee's internal business needs; and (iii) use the Documentation to support the use of the Installed Software and/or Service(s). All rights not expressly granted hereunder shall be reserved to Licensor. Additionally, Licensee shall not, sublicense, sell, rent, transfer, distribute or otherwise commercially exploit or make the Software or Documentation available to any third-party. Licensee and all of its users who have the right to use the Installed Software on behalf of Licensee under this Agreement, will be bound and comply with this Agreement.
- Restrictions. Licensee shall not, directly or indirectly (i) reverse engineer, decompile or disassemble the Software, or otherwise attempt to derive the source code of the Software, or any portion thereof; (ii) make more copies of the Software and the Documentation than is specified in this Agreement or allowed by applicable law, despite this limitation; (iii) publish or otherwise display the Software and/or the Documentation, including any screenshots of the Software, for others to copy; (iv) modify or create a derivative work of any part of the Software or Documentation; (v) use the Software other than as, or for any purpose other than that, set forth in the Documentation or in any application that may involve risks of death, personal injury, severe property damage, or environmental damage; (vi) file copyright or patent applications that include the Software or Documentation or take any other action that may transfer any intellectual property rights in the Software or the Documentation to any Person other than Licensor; and/or (vii) permit a competitor of Vision to use or view the Software and/or Documentation without Vision's expressed written permission. The Licensee recognizes that the Software and/or Documentation is itself proprietary information and shall use at least the same degree of care as it uses to protect its own proprietary information of similar kind, but in no event shall such care be less than commercially reasonable, so as to protect the Software and Documentation without limiting the generality of the foregoing.
- Provision of Installed Software. Licensor shall provide to Licensee (i)(a) the object code for the Installed Software or (b) remote access to the Installed Software and (ii) Documentation for the Installed Software. Maintenance is available only pursuant to a separate Schedule that may be attached to this Agreement.

EXHIBIT A

Locations. In the event Licensee receives the object code for the Installed Software (rather than remote access thereto) Licensee shall use the Installed Software only on the Designated Hardware and at the Designated Location(s). Licensee shall have the right to change the Location of the Designated Hardware and to upgrade the Designated Hardware to use the Installed Software on a central processing unit that replaces the Designated Hardware. In no event shall Licensee have the right to use or permit the use of the Installed Software simultaneously on more than one central processing unit in excess of the permitted number of users as set forth on the applicable Schedule.

Protection of Proprietary Rights

- Proprietary Rights. Licensee acknowledges that the Software and Documentation have been and shall be developed by Licensor at great expense to Licensor, that the Software and Documentation are proprietary to Licensor and that Licensor has, and shall have and retain, full title, ownership, proprietary and other intellectual property rights in the Software and Documentation, including without limitation, copyright, trademark, service mark, trade secret, trade name and other intellectual property rights (collectively the "Proprietary Rights"). Further, Licensee acknowledges that the Software is designed as a standard product and not as a customized product created exclusively for the Licensee.
- Licensee's Rights. Licensee acknowledges that the rights granted to Licensee hereunder are only the rights of a Licensee. Licensee acknowledges and agrees that: (i) no title or ownership of the Software or Documentation is transferred to Licensee hereby; (ii) the Software and Documentation and all Proprietary Rights are. and shall remain, the exclusive property of Licensor (or its licensors); and (iii) except for the License granted in Section 2 above, Licensee shall not have any right, title or interest in the Software or Documentation. Licensee shall not make any claim or representation of ownership, or act as the owner, of any of the Software or Documentation. Licensee agrees not to remove, change or deface, and shall include, Licensor's copyright notice and notice of its Proprietary Rights on each and every item of Software copied or reproduced.
- Licensor's Rights. Licensor acknowledges that it has no right to or interest in the data processed by Licensee using the Software, except that of limited use (i) to install, implement and maintain the Software, and (ii) for commercial purposes for that data deemed a public record pursuant to the laws and regulations of the applicable federal and state jurisdictions governing the disclosure of public records.
- Confidentiality. Licensee shall keep confidential the Software and 3.4 other information of Licensor which is confidential, proprietary or nonpublic ("Confidential Information") and shall not disclose the Confidential Information to any Person, except to employee(s) of Licensee with a need to know the Confidential Information in order for Licensee to perform its obligations under this Agreement. Confidential Information shall not include information which (i) is in the public domain at the time of disclosure or enters the public domain through no act or omission of Licensee, (ii) Licensee's written records in existence at the time of disclosure show was known to Licensee at the time of disclosure, (iii) is freely disclosed to Licensee, without restriction,

- by a third party without a duty of confidentiality to Licensor, (iv) Licensee's written records show to have been developed independently by Licensee by personnel without access to the Confidential Information, and v) do not meet the requirements of the Virginia Freedom of Information Act (§ 2.2-3700 et seq. of the Code of Virginia).
- Notification of Unauthorized Use. Licensee shall promptly notify Licensor upon becoming aware of the possession, use, or knowledge of any Confidential Information by a Person not authorized by this Agreement to have such possession, use or knowledge. Licensee shall promptly furnish to Licensor full details of such possession, use or knowledge and shall use reasonable efforts to cooperate with Licensor, at Licensor's expense, in any action taken or deemed necessary by Licensor to protect the Confidential Information or Proprietary Rights.

Warranties

4.1 Software Warranty. Licensor warrants to the Licensee that the Installed Software shall operate in all material respects in accordance with its Documentation for duration of the Warranty Period ("Software Warranty"). Licensee's exclusive remedy and Licensor's exclusive obligation for any breach of this Software Warranty shall be the correction of Defects or replacement by Licensor of the nonconforming portion of such Installed Software, at Licensor's sole election. The failure of Licensee to notify the Licensor within the Warranty Period of the failure of the Installed Software to conform to the Documentation therefor shall relieve Licensor of its obligations and liabilities under this section of this Agreement. Licensee's notice shall disclose the items within the Documentation to which such Installed Software fails to conform and the manner in which the Installed Software fails to conform with sufficient specificity to permit Licensor to reproduce and correct such nonconformity. In the event Licensor determines, in its sole discretion, that it cannot, using commercially reasonable efforts, correct a Defect or replace such nonconforming portion of the Installed Software, Licensee may return the Installed Software and Documentation and receive a refund of the License fee paid hereunder. Licensee's right to return the Installed Software and Documentation and receive a refund hereunder shall expire at the expiration of the Warranty Period. This Software Warranty shall be null and void upon, and shall not apply to any Defect or nonconformity caused by (i) any modification or alteration of the Software or Licensee's equipment other than by or with prior approval of Licensor, (ii) misuse or abuse of the Software or Documentation, (iii) negligence or wrongdoing of Licensee in connection with the Software or Documentation, (iv) force majeure events as set forth in this Agreement, (v) malfunction of any of Licensee's equipment, or (vi) use of the Software or Documentation in any manner inconsistent with this Agreement or the Documentation therefor. Licensee shall pay Licensor at Licensor's then-current time and materials rates for its Services in the event Licensee makes a Software Warranty claim that is null and void or inapplicable hereunder. The Software Warranty does not apply to any portion of the Software, Documentation, supplies or materials which are, by their nature, consumable or expendable. 6.3 The Warranty Period for Enhancements will run contiguously with the Software Warranty for the enhanced Installed Software, unless Licensor notifies Licensee that a longer Warranty Period

EXHIBIT A

- applies upon delivery of the Enhancement to Licensee. The Warranty Period for Upgrades shall be as set forth in the Schedule or other agreement pursuant to which the Upgrade is provided.
- Services Warranty. Licensor warrants that all Services will be performed in a professional and workmanlike manner, consistent with then-current industry standards ("Services Warranty"). Licensee's remedy for a breach of the Services Warranty will be, at Licensor's option, either to (i) re-perform such Service(s); or (ii) to provide Licensee a refund for the allegedly defective Service(s).
- Warranty Exclusions; Exclusive Remedy. Licensor does not warrant that the Software will satisfy, or may be customized to satisfy, all of Licensee's requirements or that the use of the Software will be uninterrupted or error-free.

5 Maintenance Services and Enhancements

- Commencement of Maintenance Service. Licensee acknowledges that this Agreement includes certain warranties for the Installed Software and Services, and that these warranties are separate from any Installed Software maintenance service. The commencement date of maintenance service and whether or not the maintenance service period overlaps with any Warranty Period will depend on the maintenance service purchased by Licensor.
- Enhancements During Warranty. Licensor shall provide to Licensee during the Warranty Period, at no additional expense to Licensee, any correction or Enhancement provided by Licensor, as determined by Licensor in its sole discretion. After the expiration of the Warranty Period, Enhancements and Upgrades shall be available to Licensee as maintenance services, available for purchase pursuant to a maintenance Schedule. Enhancements and Upgrades shall also be available to licensees who have not purchased a maintenance Schedule and are not and have not been in breach of any agreement between such licensee and Licensor, on a time and materials basis, at Licensor's then-current terms and conditions, including Prices.

Limitation of Liability; Indemnification

- Limitation of Liability. Licensor shall not be liable for any loss or damage that Licensee suffers or claims to have suffered other than, subject to the limitations set forth below, a loss or damage directly caused by Licensor's negligence or willful misconduct. Both Parties agree that Licensor has no liability whatsoever for Licensee's data or equipment.
- Exclusion of Consequential Damages. In no event will either Party be liable to the other for (i) incidental, consequential, indirect, special, punitive or exemplary damages, whether claimed under contract, tort or any other legal theory, including but not limited to loss of use, revenue or profit, or (ii) loss of or damage to Licensee data or programming, in either event whether or not such Party had notice of the possibility of such damages occurring or should have known of such possibility. The representations and warranties made in this Agreement extend only to Licensee and its permitted successors and assigns.

Intellectual Property Indemnification

- Defense and Cooperation, Licensor shall, at its own expense with counsel of its own choosing, defend any claim made against Licensee asserting that the Software infringes upon the United States patent or copyright rights of a third party, provided that Licensee provides immediate notice of such claim and Licensor has full control of such defense, the right to settle or compromise such claim and the incurring of any expense related thereto. Licensee shall fully cooperate with Licensor in any such defense.
- Infringing Software. In the event of any claim described in Section 7.1 "Defense and Cooperation" above, or upon Licensor's determination that such a claim may occur, Licensor shall have the right, at its option, to (i) procure for Licensee the right to continue using that portion of the Software claimed to be infringing, (ii) require Licensee to cease using that portion of the Software claimed to be infringing and replace such portion with other software to make the Software non-infringing, or (iii) require Licensee to cease using that portion of the Software or Documentation claimed to be infringing and refund to Licensee a pro rata portion of the fee paid by Licensee for the License granted hereunder.
- Failure of Notification. The failure of Licensee to notify Licensor of such claim shall relieve Licensor of its obligations and liabilities under this Section 7 "Intellectual Property." Licensor shall have no liability or obligation to Licensee under this Section 7 if any such claim is made by an affiliate of Licensee or is based upon, arises out of or results from (i) any product or information or data not provided by Licensor, (ii) the failure of Licensee to use Enhancements or Upgrades to the Installed Software, (iii) modification or alteration of the Software by a Person other than Licensor, (iv) misuse or abuse of the Software, (v) negligence or wrongdoing of Licensee or any malfunction, modification or alteration of Licensee's equipment, (vi) force majeure events set forth in this Agreement, or (vii) use of the Software in any manner inconsistent with this Agreement or the Documentation.

Term and Termination

- Term. This Agreement shall commence as of the latter date of both Parties' signatures and continue as specified in the main
- 8.2 Termination at End of Term. Either Party hereto shall have the right to terminate this Agreement as it relates to the Services purchased under this Agreement at the end of any applicable specified term listed within an applicable Schedule upon ninety (90) days' written notice to the other prior to the expiration of such
- 8.3 Termination for Material Breach. Each party shall have the right, upon ten (10) business days' notice to the other party, to terminate this Agreement upon the other party's breach of any of the terms and conditions of this Agreement or any other agreement between Licensor and Licensee. This Agreement shall automatically terminate in the event Licensee is unable to pay debts as they come due.
- 8.4 Effect of Termination. Immediately upon the termination of this License, for any reason, Licensee shall deliver to Licensor all copies in Licensee's possession of the Software and Documentation, in whatever form, shall destroy any copies of

EXHIBIT A

- materials containing Confidential Information, and shall certify in writing under oath that all materials required to be delivered to Licensor or destroyed have been so delivered or destroyed.
- Obligations after Termination. The termination of this Agreement shall be without prejudice to any rights of either Party against the other and such termination shall not relieve either Party of any of its obligations to the other existing at the time of termination.
- 8.6 Additional Remedies Due to Breach, Licensee acknowledges that, because of the confidential and proprietary nature of the Software, neither termination of this Agreement, nor arbitration, nor would an action at law be an adequate remedy for a breach by Licensee of Sections 2, "License Grant and Restrictions" and 3, "Protection of Proprietary Rights" of this Agreement. Accordingly, Licensee agrees and consents that in the event of such a breach, in addition to all other remedies which the injured Party may have, the injured Party shall be entitled to relief in equity, including a temporary restraining order, temporary or preliminary injunction and permanent injunction to restrain the continuation of any such breach or to compel compliance with the provisions of this Agreement.
- 8.7 Surviving Sections. Notwithstanding anything to the contrary in this Agreement, 2.3, "Restrictions"; 3, "Protection of Proprietary Rights"; 6, "Limitation of Liability and Indemnification"; 7, "Intellectual Property; 8, "Term and Termination"; 9, "Payment and Prices"(to the extent incurred prior to termination); and 10. "General Provisions" shall survive expiration or earlier termination of this Agreement.

Payment and Charges

- Fees. Licensee shall pay to Licensor a fee in the amount set forth in the applicable Schedule(s) for the Installed Software, Documentation and or Services subject to this Agreement ("Fees"). Parts and supplies shall be provided to Licensee, when needed and as available, at Licensor's then-current terms, conditions and Prices, for as long as this Agreement is in effect and Licensee is not in breach hereof. Maintenance Services shall be provided as set forth in the applicable Schedule(s), upon the terms and conditions set forth therein.
- Taxes. In the absence of valid documentation certifying exemption to the following, Licensee shall pay when due, any sales, use, excise, property, customs or other taxes, duties, tariffs or other assessments and related interest and penalties that Licensor may, at any time, become obligated to pay or collect in connection with or arising out of this Agreement, the License granted hereby or the Services to be provided hereunder (other than taxes based on Licensor's net income). In the event Licensor is required to and does pay any such amounts which Licensee is obligated to pay, Licensee shall, upon the request of Licensor, promptly reimburse Licensor an amount equal to the amount so paid by Licensor paid or incurred by Licensor in connection therewith, in no event later than thirty (30) business days following receipt by Licensee of an invoice from Licensor therefor.
- 9.3 Suspension of Performance. Failure of the Licensee to make payments when reasonably due under the terms of this Agreement shall entitle the Licensor, in addition to its other rights and remedies, to suspend further performance of the project.

10 General Provisions

- 10.1 Governing Law and Venue. This Agreement shall be governed by and construed under and pursuant to the laws of the Commonwealth of Virginia, exclusive of the laws relating to conflict of laws. Any dispute under this Agreement shall be heard and determined in any state or federal court sitting in the Commonwealth of Virginia, and each of the parties hereto hereby consents to the exclusive jurisdiction of such courts (and of the appropriate appellate courts therefrom in any such claim, action, suit or proceeding) and irrevocably waives, to the fullest extent permitted by applicable law, any objection that it may now or hereafter have to the laving of venue of any such claim, action, suit or proceeding in any such court or that any such claim, action, suit or proceeding that is brought in any such court has been brought in an inconvenient forum.
- 10.2 Entire Agreement. This Agreement and any Schedules, addenda and exhibits hereto, represent the entire and integrated agreement between the Licensee and Licensor and supersedes all prior negotiations and representations, either written or oral, with respect to the subject matter hereof and thereof. Where any conflict arises between this Agreement and other documents forming part of the Agreement, this Agreement shall control. This Agreement may not be released, discharged, changed or modified except by an instrument in writing signed by a duly authorized representative of each of the Parties hereto.
- 10.3 Headings. The headings and captions used in this Agreement are intended and shall, for all purposes, be deemed to be for convenience only and shall have no force or effect whatsoever in the interpretation of this Agreement.
- 10.4 Counterparts. This Agreement may be executed in two or more counterparts, each of which shall be deemed an original for all purposes hereunder and all of which, when taken together, shall be deemed one and the same instrument.
- 10.5 Severability. If any term, clause or provision of this Agreement shall be judged invalid for any reason whatsoever by a court of competent jurisdiction, such invalidity shall not affect the validity or operation of any other term, clause or provision; and such term, clause or provision shall be deemed to have been modified to the extent necessary to make it valid and enforceable; or, if such term, clause or provision cannot be so modified, it shall be deemed deleted from this Agreement.
- All notices, requests, demands and communications required or permitted under this Agreement shall be deemed to have been duly given and made, if in writing and

EXHIBIT A

- served either by personal delivery or facsimile to the Party for whom it is intended or by being delivered postage prepaid, certified or registered mail, return receipt requested (or such form of mail as may be substituted therefore by postal authorities), in the United States mail, or with Federal Express or similar courier service, bearing the address shown in this Agreement or such other address as may be designated in writing thereafter by such Party. The addresses used to give such notices are as stated below.
- 10.7 No Waiver. The failure of either Party to enforce at any time any of the provisions of this Agreement or the failure to require, at any time, performance by the other Party, of any of the provisions of this Agreement shall in no way be construed to be a present or future waiver of such provisions and shall not in any way affect the right of the Party to enforce each and every such provision thereafter. The express waiver by either Party of any provision, condition or requirement of the Agreement shall not constitute a waiver of any future obligation to comply with such provision, condition or requirement.
- 10.8 Cumulative Rights. All rights and remedies conferred under this Agreement or any other instrument or law shall be cumulative and may be exercised singularly or concurrently.
- Force Majeure. Either Party will not be liable for any failure or delay in performing services or any other obligation under this Agreement or for any damages suffered by the other Party or an end user by reason of such failure or delay, which is, indirectly or directly, caused by an event beyond that Party's foreseeable control but not limited to riots, epidemics, pandemics, shelter in place or stay at home orders, natural catastrophes, terrorist acts, governmental intervention or advisories, or other acts of God, or any other causes beyond the Party's reasonable control.
- 10.10Authority. Each Party has full power and authority and has been duly authorized to enter into and perform its obligation under this Agreement, including Licensee's authority to enter into an agreement of this scope and duration, all necessary approvals having been obtained. The execution, delivery and performance of this Agreement by each Party shall not violate, create a default under or breach of any charter, bylaws, agreement or other contract, license, permit, indebtedness, certificate, order decree or security instrument to which such Party or any of its principals is a party or subject to.

3/28/2022 | 6:41 AM PDT

EXHIBIT A

IN WITNESS WHEREOF, the Parties hereto have hereunto set their hands and seals as of their respective dates written below. Licensee: Licensor: City of Norfolk, Virginia Vision Government Solutions, Inc. 810 Union Street 1 Cabot Road Norfolk, VA 23510 Hudson, MA 01749 Signature: Signature: Michael Beris Diane Basile, CFO By: Diane Basile, CFO By: Michael Bevis Title: Title: Chief Procurement Officer CF0 Date: Date: 3/27/2022 | 5:16 PM EDT

EXHIBIT B



CAMA SOFTWARE

STATEMENT OF WORK

This CAMA Software Statement of Work ("SOW") is made part of the Master Software License and Services Agreement (the "Agreement") by and between Vision Government Solutions, Inc., a Massachusetts corporation with its principal place of business at 1 Cabot Road, Hudson, Massachusetts 01749 ("Vision") and the customer identified below ("Customer"). Vision and Customer may be collectively referred to as "Parties" or individually as a "Party."

WHEREAS, Vision is willing to provide, and Customer desires Vision's provision of certain Software, on the terms and subject to the conditions set forth herein.

NOW, THEREFORE, in consideration of the foregoing premises and of the conditions and mutual covenants contained herein, and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the Parties hereto agree as follows:

1 Definitions

- 1.1 All capitalized terms used herein will have the meanings attributed to them within the Agreement unless otherwise noted.
- "User" means a named end-user of the Software who has the Software installed upon his/her workstation.

Software Description

- 2.1 The following Software is being licensed to the Customer according to the terms of the Agreement:
 - The Software is the Vision Government Solutions, Inc., Windows-based computer-aided mass appraisal (CAMA) software, Appraisal Vision Version 8. The software elements included are designed for real estate valuation including. cost and comparison sales, data maintenance, sales analysis, reporting and query, image display, and income capitalization
 - The Software includes Vision's commercial off-the-shelf GIS module and includes Vision's commercial-off-the-shelf Marshall & Swift module.
- 2.2 The Software is commercial off-the-shelf (COTS) and may be configured, not customized, to address Customer requirements.
- 2.3 The Customer's Designated Hardware must comply with the applicable minimum hardware specifications, which may be updated by Vision from time to time.
- 2.4 Only Vision-developed connections to the database will be supported at Vision's sole discretion.

3 Users

- 3.1 The Software is being licensed pursuant to the Agreement with the understanding that it will only be installed on the Designated Hardware and on workstations for use up to the maximum number of Users identified below.
- 3.2 The Software is being licensed for up to (27) Users, with an additional (20) read-only Users.

Warranty; Maintenance

- 4.1 The Software Warranty as described within the Agreement shall be the exclusive warranty governing the Software provided within this SOW.
- 4.2 The Services Warranty as described within the Agreement shall be the exclusive warranty governing any Services provided within this SOW.
- Any software maintenance, separate from any software maintenance which may be part of the Software Warranty shall be governed by a separate Schedule.

Project Management

Vision will assign specific personnel to oversee implementation of the Software, and to act as the primary point-of-contact on behalf of Vision to communicate with the Customer.

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- 5.2 Customer will assign a primary point-of-contact to work with Vision's Project Manager throughout the project. We request that the primary point-of-contact aims to respond to Vision inquiries within 48 hours in order to keep project schedule on
- 5.3 Vision will provide basic analysis of the Customer's requirements in comparison with the Software to identify gaps in functionality and guide the initial configuration of the Software. Vision has no duty to provide any analysis of the Customer's business processes; however, Vision may provide suggestions to Customer with regard to the Customer's business processes as Vision performs its work.
- 5.4 Vision and Customer will identify a mutually agreeable schedule for regular project status check-ins to share information and feedback in the spirit of adhering to the scheduled milestones outlined in Exhibit A.
- 5.5 Decisions made and/or approvals granted by Customer's primary point-of-contact will be maintained in the event of a change in primary point-of-contact, with the goal of eliminating re-work by either party.

Installation Services

- Subject to Customer making available to Vision appropriately configured and located hardware in a safe environment, Vision will install the Software on the Designated Hardware.
- Vision has provided the Vision 8 Hardware and Software Specifications document to Customer. Customer is responsible for preparing an adequate environment to install Vision 8. If a suitable hardware environment is not available on the scheduled installation date, Vision will install Customer's software on Vision Cloud, which will be billed at the then-current annual

Conversion Services

- Vision will convert the following data from the Customer's legacy software:
 - For the database containing information from the current year and five historical years, Vision will convert names, addresses, property characteristics and sketches for residential and commercial properties.
 - b) For the remaining years as are stored in the Customer's legacy CAMA software, Vision will convert assessment history and ownership transfer history.
- 7.2 The Customer agrees to comply with following requirements to facilitate the conversion process. The Customer's failure to comply may result in an adjustment to the timing of deliverables or incur additional cost:
 - Upon Vision's request, Customer will provide to Vision the Customer's data dictionary (i) in an ASCII file format along with an unambiguous file layout for sketches, (ii) as database files in Oracle or SQL format, or (iii) in any other manner acceptable to Vision.
 - b) For sketches, the Customer must provide sketch data in a non-proprietary traverse format which shows "pen" movements for each sketch shape, and also links each shape to its associated sketch label. The data shall also include pointers from which Vision can derive the spatial relationship between shapes. It is the Customer's responsibility to provide the sketch data in a format that the Software can read or understand, or easily electronically convert. This may require the Customer to seek assistance from the legacy system vendor.
 - c) Prior to the commencement of conversion services, Customer will deliver a complete set of data files to Vision by internet file transfer protocol (FTP). Vision charges an additional fee on a time-and-material basis for any Customer data which Vision needs to pull from the Customer. A complete data set includes all files, sketches, photos, and associated documents.
 - Vision will perform one beta and one live electronic conversion of Customer's current real estate file. Any changes made to the legacy system after the live electronic data is submitted to Vision are the Customer's responsibility. Only a live conversion will be completed on historical real estate files. It is Customer's responsibility to provide the live electronic database in the same format as the beta database supplied during the beta conversion. Conversion of Personal Property information is not included in this SOW.
 - For data conversion of multi-year databases, the same schema data layout, code tables and data content that existed for the current year database conversion must exist in the same format in all the prior year history databases to be converted. Historical conversions assume re-use of primary conversion routines developed to convert the live Customer data. Vision reserves the right to revisit pricing and/or conversion timing of historical databases should their structure warrant significant changes to the primary conversion routines.
 - Customer will run a full recalculation of each database prior to installation. All errors reported in the recalc error log are to be corrected prior to delivery of files to Vision.

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- g) Parcels which encounter a value change will be placed on "value override" within the Software.
- h) Customer is responsible for the quality of the data it provides to Vision. Incomplete files, erroneous data, or data which is otherwise unsatisfactory for conversion which leads to rework by Vision will be an additional charge and may also impact the project timeline.
- i) Customer will provide consistent parcel information. Vision will notify Customer of any discrepancies found and will make a reasonable attempt to correct errors, where feasible. Vision will provide a list to Customer of any uncorrected data that is incomplete or contradictory.
- i) Vision does not convert Marshall & Swift data into the Marshall & Swift module.
- 7.3 Vision agrees to commence installation and data conversion according to a mutually agreed upon timeline between the Parties. Both Vision and Customer understand and agree that any predetermined dates and/or schedules as they relate to the conversion of data will be adjusted to reflect the actual date of commencement. Any delay in the Customer's provision of any required information or documentation to Vision will automatically extend deadlines by the number of business days equal to the number of business days attributable to the Customer's delay.
- 7.4 Vision does not guarantee that calculated values in the Customer's legacy system will match calculated values in the Software after conversion.
- 7.5 At the Project Manager's best judgement and as a value-added service, Vision will partner with Customer to create a foundation for valuation as part of the conversion.
 - a) Vision will conduct up to 120 hours of market-based cost Value Calibration Services to align Vision-calculated parcel values with those calculated by the legacy system (excluding legacy system overrides). Vision will develop the initial value foundation during the project's Revised Beta phase and finalize the Value Calibration Services during the Go-Live conversion phase.
 - b) Customer acknowledges that all CAMA systems employ proprietary valuation engines, leveraging system-specific methodology, rates, tables, formulas, and database structures. The Vision Implementation team will integrate available legacy rates and models that align with the Vision valuation engine, statistical analysis, data mining, industry knowledge and heuristics, and customer insights to develop market-based cost models. The Customer understands that Vision does not guarantee a 1 to 1 value match upon completing these services. Deviations between the Legacy system values and Vision values will vary based on dissimilarity between systems. The valuation accuracy depends on the legacy data quality and consistency, the legacy system valuation engine, and the number of data transformations performed during the conversion.
 - c) Customer is responsible for providing all available legacy system rates, valuation schedules, documentation, methodologies, external work files, and any other relevant legacy system information to support Vision throughout the Value Calibration Services.
 - d) Vision performs Value Calibration Services for the Live database only. Any Historical databases will be placed on value freeze to retain legacy system parcel values.
 - e) These services do not include or replace reassessment services, and the Customer understands that work conducted is strictly mathematical and does not comply with USPAP standards.
 - f) If desired, Customer may request additional Value Calibration Services or Appraisal Consulting as outlined in Section 2. Optional Services.
 - g) Customer acknowledges that all of the above are best efforts by the Vision implementation team and are dependent on the quality of the legacy data and the responsiveness of the Customer and will not withhold payment for said value-added services.

8 Import / Export Development

- 8.1 As part of this SOW, Vision is providing the following imports/exports:
 - a) One (1) export to the Tax system
 - b) The Vision standard Building Permit Import

Vision and Customer will collaborate on developing clear specifications. Changes to these specifications that result in additional work may require additional Fees.

8.2 Any additional imports or exports will be charged at Vision's then-current rates as a separate Change Order to this Statement of Work.

EXHIBIT B

- 8.3 Vision will provide up to five (5) standard "executive dashboards" designed to visualize data from the CAMA system. These dashboards are standard and Customer-specific modifications to the standard format may require additional Fees. These dashboards will be delivered in Microsoft PowerBI. Customer is responsible for providing PowerBI licensing to its internal users.
- 8.4 Vision will also partner with Customer's current mobile provider, Data Cloud Solutions, to create an extract from Vision CAMA to the currently-installed MobileAssessor software.

9 Training Services

- 9.1 The quantity of training to be provided is as follows:
 - a) 10 days of training provided at Customer's location or via teleconference
 - b) A bank of four (4) "refresher" training days
- 9.2 If training days are not used immediately after go-live, they will be banked for future use in Customer's training day bank. Payment for milestones enumerated in Section 10 cannot be withheld for training scheduling.
- 9.3 Training sessions will address three distinct levels of expertise: (a) daily CAMA usage, (b) advanced appraisal usage, and (c) technical support.
- 9.4 The Customer will provide suitable facilities for training sessions according to Vision's requirements for effective knowledge transfer.
- 9.5 The Customer must give notice of any training session cancellation to Vision at least forty-eight (48) hours prior to the commencement of the training session.

10 Fees and Payments

- 10.1 In consideration of Vision's provision of the Software and Services to the Customer pursuant to this SOW and any attachments thereto, the Customer will pay to Vision Six-hundred eighty-seven thousand dollars (\$687,000), as itemized below:
 - a) 5% due upon completion of first three project meetings (project kick-off plus two weekly meetings)
 - b) 20% due upon completion of initial database mapping
 - c) 25% due upon installation of beta conversion
 - d) 25% due upon installation of revised beta conversion
 - e) 20% due upon live database conversion
 - f) 5% due 60 days after live database conversion
- 10.2 The above Fees are based on a parcel count of **72,900.** If this parcel count increases by more than 2,000, Fees are subject to change.
- 10.3 The Customer will make payment within 30 days of receiving a correct invoice.
- 10.4 Necessary travel and related incidental expenses will be invoiced monthly as incurred.
- 10.5 Customer will use its best efforts to adhere to its milestones as set forth in Project Schedule provided in Exhibit A. If scheduled milestones are missed by more than one (1) week due to delays caused by Customer, the project will be extended by the time period caused by the delay and Vision reserves the right to modify the dates of any subsequent milestones accordingly.
- 10.6 Vision is not providing any third-party licenses, and therefore this SOW does not include any license fees for third party products which can include but are not limited to MS SQL License, Microsoft Windows License, ESRI's ArcGIS, the Marshall & Swift Cost MVP Cost Calculators, or database software.
- 10.7 Vision shall use commercially reasonable efforts to provide the License Software and Services in accordance with the schedule set forth in Exhibit A, subject to any delays caused by the Customer or by *force majeure* events as provided in the agreement. Any delays caused by Vision will result in extension of the project at no cost to the customer.

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11 Optional Services

11.1 or the additional fees listed with each item below, the Customer may elect to add the following optional services. Each addition will require an executed contract amendment. The fees for these optional services are subject to change.

a)	Additional User Training	\$1,400/day
b)	Web Hosted CAMA Data	\$12,500 / year
c)	Annual Cloud Hosting Services	\$24,750 / year
d)	Deed Import Solution (such as JustAppraised)	Priced upon scoping
e)	Document Hyperlink / Smartlink Configuration	Priced upon scoping
f)	Additional Custom Imports or Exports	Priced upon scoping
g)	Custom Workflow Configurations or Modifications to COTS Vision 8	Priced upon scoping
h)	Additional Value Calibration or Appraisal Consulting Services	Priced upon scoping
i)	Data Clean-Up Services	Priced upon scoping
j)	2-week Project Extension due to Customer delay	\$11,000
k)	Custom Property Record Card template (2 included free)	\$2,500

12 Termination & Suspension

- 12.1 Customer may terminate this SOW upon thirty (30) days' prior written notice to Vision (the "Notice Period") in the event that Vision materially breaches this SOW and Vision has failed to cure such breach within such Notice Period.
- 12.2 Any termination of the Agreement shall result in the immediate termination of this SOW subject to the terms and conditions of the Agreement and this SOW.
- 12.3 The termination of this Schedule shall be without prejudice to any rights of either party against the other, and such termination shall not relieve either party of any of its obligations to the other accruing up to the time of termination including the Customer's obligation to pay any fees due.
- 12.4 Vision reserves the right to suspend the performance of Services under this SOW if the Customer fails to pay any fees that are unpaid after sixty (60) days of becoming due and upon 10 days' written notice to the Customer. During any such suspension, Services shall be restored once any outstanding fees have been paid in-full.

IN WITNESS WHEREOF, the Parties hereto have hereunto set their hands and seals as of their respective dates written below.

Licensee:	Licensor:
City of Norfolk, Virginia	Vision Government Solutions, Inc.
810 Union Street	1 Cabot Road
Norfolk, VA 23510	Hudson, MA 01749
Signature: Docustyned by: Midnal Bruis	Signature Diane Basile, CFO
By: Michael Bevis	By: Diane Basile, CFO
Title: Chief Procurement Officer	Title: CFO
Date: 3/28/2022 6:41 AM PDT	Date: 3/27/2022 5:16 PM EDT

EXHIBIT B

Exhibit A: Project Schedule

Milestone	Responsible Party	Schedule Requirements
Contract Negotiations Complete	City and Vision	March 7, 2022
Project Kick-Off	City and Vision	Schedule kick-off call immediately after contract signature
Community Supplies Information to Vision	City	+ 2 weeks from kick-off call
Data Mapping for Conversion	Vision	+ 5 weeks
Supply Non-Proprietary Legacy Sketch Data	City	+ 0 days
Beta Conversion	Vision	+5 weeks
Beta Conversion Delivery	Vision	+ 1 day
Beta Conversion Review and Feedback	City	+ 3 weeks
Revised Beta Conversion with Initial Value Foundation, per Previously Identified Revisions	Vision	+ 4-6 weeks, depending on workload required from revisions
Install Revised Beta Conversion	Vision	+ 1 day
Revised Beta Conversion Review and Approval	City	+ 3 weeks
Supply Live Legacy Data	City	+ 1 day
Convert Live Legacy Data	Vision	+ 3-4 weeks, depending on valuation modifications required
Install Live Converted Data	Vision	+ 1 day
Supply Historical Database	City	+ 0 days
Convert Historical Databases	Vision	+ 2 weeks per database
Install Converted Historical Databases	Vision	+ 1 day
Project Go-Live	City and Vision	+ 1 day

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EXHIBIT B

Schedule and Execute Training	City and Vision	Post go-live install, at mutual convenience
Transition to Ongoing Customer Support	City and Vision	4-week period with weekly check-in calls between Project Manager, Customer Support, and City

Attachment 1



SOFTWARE MAINTENANCE SERVICES SCHEDULE

This Maintenance Services Schedule ("Schedule") is made part of the Master Software License and Services Agreement by and between Vision Government Solutions, Inc., a Massachusetts corporation with its principal place of business at 1 Cabot Road, Hudson, Massachusetts 01749 ("Vision") and the City of Norfolk, Virginia ("Customer"). Vision and Customer may be collectively referred to as "Parties" or individually as a "Party."

WHEREAS, Vision is willing to support, and Customer desires for Vision to support, such Software as described below, on the terms and subject to the conditions set forth herein.

NOW, THEREFORE, in consideration of the foregoing premises and of the conditions and mutual covenants contained herein, and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the Parties hereto agree as follows:

1 Definitions

- All capitalized terms used herein shall have the meanings attributed to them within the Agreement unless otherwise noted. 1.1
- "Business Hours" shall mean 8:30am to 4:30pm Eastern Standard Time, Monday through Friday, Vision holidays excluded.

Term and Automatic Renewal

The term of this Maintenance Schedule shall commence upon the execution of this Agreement, then continue for one (1) year from the earlier of install date or October 1, 2022 ("Initial Term"). Thereafter, the term will continue with automatic renewals for four (4) additional successive one (1) year periods, unless written notice of non-renewal is delivered by either Party to the other not less than thirty (30) calendar days prior to the expiration date of the then-current term ("Renewal Term"). Both the Initial Term and any Renewal Term may be referred to collectively as the "Maintenance Term."

Maintenance Services Provided

- During the Maintenance Term, upon and subject to the terms and conditions of the Agreement and this Schedule, Vision will provide to Customer during Business Hours reasonable operational support and assistance as described below in connection with the use of the Software:
 - Corrections to the Installed Software and Documentation of Defects reported by Customer to Vision, which Defects are caused by errors in the then-current release of the Installed Software, provided that such Defects are reported to Vision no later than two (2) business days after the Defect first occurs or arises.
 - b) Telephone or email support with respect to the Services delineated in Sections 3.1(a) hereof.
 - c) Vision's obligation to provide a response pursuant to this Section 3.1 is void if the Customer does not allow reasonable access to the Installed Software for diagnostics and examination, or in the event of causes beyond the control of Vision, including but not limited to acts of God, fire, flood, strike, national emergency or failures of communications facilities or lines.
- 3.2 Vision shall use commercially reasonable efforts to respond to any request for support hereunder within one (1) business day of receiving such request.
- Notwithstanding anything herein to the contrary, the Services to be provided hereunder shall not be covered by this Schedule, and shall be provided (if at all) on a time and materials basis, if the Software malfunctions due to or generates a Defect from:

Software Maintenance Services Schedule Page 1 of 4

- a) Acts of God or natural disasters, including but not limited to fire, smoke, water, earthquakes, lightning or static electricity;
- b) Causes external to the Software such as, but not limited to, electrical power fluctuations or failures, lack of air conditioning or proper temperature control, accidents, burglary or vandalism;
- c) The neglect, misuse (including faulty repair or maintenance by Persons other than Vision), or improper storage of the Software or the Designated Hardware on which the Software is installed, or other failure to comply with the instructions set forth in the Documentation or provide a suitable environment for the Installed Software;
- d) A modification or alteration of the Software not provided by Vision;
- e) A malfunction of any equipment not provided by Vision with which the Software is used or combined;
- f) Use of the Software in a manner for which it was not designed; or
- g) The failure of Customer to back-up its data or otherwise to fulfill any obligation under this Schedule or the Agreement, for the Installed Software supported hereunder.
- 3.4 This Schedule further shall not apply to, and the Services shall not be deemed to include:
 - a) Development or engineering of the Software, unless Vision shall deem such development or engineering necessary in its providing services under section 3.1 above;
 - b) Upgrades, customizations or other enhancements to the Software or Installed Software;
 - c) Supplies, accessories, media or other materials which are, by their nature, expendable or consumable, except for media which may be provided as part of the Services described in section 3.1 above;
 - d) Any services, including, without limitation, installation, alterations, modifications, maintenance or removal of, or relating to any item not furnished by Vision, and
 - e) Any services related to work external to the Software, including, without limitation, electrical work, cable routing or changes that affect the Specifications or the Customer's equipment and other software.

4 Warranty

4.1 The Services Warranty as described within the Agreement shall be the exclusive warranty governing the Services provided within this Schedule.

5 Customer Responsibilities

- 5.1 Customer shall install and maintain, at its expense, hardware (including without limitation a central processing unit, local area network or network server) and communication equipment (including, without limitation, modem and remote access) that is compatible with the Software and that meets Vision's minimum hardware configuration requirements.
- 5.2 Customer shall ensure that the environment, space and access to and availability of power comply, at all times, with Vision's minimum space and suitability requirements. Customer shall ensure that Vision has full, free and safe access to the Software and Customer's facilities and equipment for purposes of fulfilling its obligations hereunder. Customer shall provide (a) (i) media (tapes, floppy disks and/or disk packs), (ii) supplies, (iii) a current back-up of the current version of the Software, (iv) data, the use of hardware and/or other equipment, (v) other software, communications facilities, and (vi) other materials (other than tools) required to maintain and/or test the Software; (b) reasonable secure storage for such Customer-provided materials; and (c) reasonable secure storage for such equipment and tools as Vision elects to store at Customer's premises.
- 5.3 Customer shall back-up all files each day according to industry accepted standards. Vision shall not be responsible for, or be liable with respect to any loss of or damage to Customer data from failure of Customer to back-up its files or otherwise.
- 5.4 Customer shall bear sole responsibility to correct problems or Defects in compatibility between the Software and the Designated Hardware or other software resulting from modifications of the Software, Designated Hardware and such software by any Person other than Vision.

6 Fees and Payments

- 6.1 The fee for the Services performed hereunder during the Initial Term shall be as follows for each maintained Software product subject to this Schedule ("Initial Fee"):
 - a) Vision 8 CAMA Software (27 Users) Fifty-four thousand, seven hundred and fifty dollars (\$54,750).
- 6.2 The Initial Fee shall be due and payable upon the earlier of install date or October 1, 2022 and must be paid in full prior to the commencement of Services hereunder.
- 6.3 The Initial Fee shall be fixed as set forth in this Schedule for the entire term of this Agreement.
- 6.4 The Renewal Fees for Renewal Terms One through Four are as follows.

a)	First Renewal Term	\$57,215
b)	Second Renewal Term	\$59,788
c)	Third Renewal Term	\$62,479
d)	Fourth Renewal Term	\$65,290

6.5 Any Renewal Fee hereunder shall be due and payable in full within thirty (30) days of receipt a correct invoice.

7 Termination; Suspension of Service

- 7.1 Either party shall have the right to terminate this Agreement upon thirty (30) days written notice to the other Party.
- 7.2 Vision reserves the right to suspend the performance of Services under this Schedule if the Customer fails to pay any fees that are unpaid after ninety (90) days of becoming due. During any such suspension, Services shall be restored once any outstanding fees have been paid in-full.
- 7.3 The termination of this Agreement shall be without prejudice to any rights of either party against the other, and such termination shall not relieve either party of any of its obligations to the other existing at the time of termination including the Customer's obligation to pay any fees due.

By signing below, each Party acknowledges that it has read this Schedule and the Agreement to which it is attached, understands them, and agrees to be bound by their terms and further agrees that they are the complete and exclusive statement of the agreement between the Parties, which supersedes and merges all prior proposals, understandings, and all other agreements, oral or written, between the Parties relating to the subject matter of this Schedule. This Schedule may not be modified or altered except by a written instrument duly executed by both Parties.

FURTHER, each Party has full power and authority and has been duly authorized to enter into and perform its obligation under this Schedule, including Customer's authority to enter into an agreement of this scope and duration, all necessary approvals having been obtained. The execution, delivery and performance of this Schedule by each Party shall not violate, create a default under or breach of any charter, bylaws, agreement or other contract, license, permit, indebtedness, certificate, order decree or security instrument to which such Party or any of its principles is a Party or subject to.

In witness whereof, the Parties hereto have hereunto set their hands and seals as of their respective dates written below.

Customer:	Vision:
City of Norfolk, Virginia	Vision Government Solutions, Inc.
810 Union Street	1 Cabot Road
Norfolk, VA 23510	Hudson, MA 01749
Signature:- Docustymed by: Michael Bris	Signature: Diane Basile, CFO
By: Michael Bevis	By: Diane Basile, CFO
Title: Chief Procurement Officer	Title: CFO
Date: 3/28/2022 6:41 AM PDT	Date: 3/27/2022 5:16 PM EDT



CLOUD SERVICES SCHEDULE

This Cloud Services CAMA Software Schedule ("Schedule") is made part of the Master Software License and Services Agreement by and between Vision Government Solutions, Inc., a Massachusetts corporation with its principal place of business at 1 Cabot Road, Hudson, Massachusetts 01749 ("Vision") and City of Norfolk, Virginia ("Customer") (the "Agreement"). Vision and Customer may be collectively referred to as "Parties" or individually as a "Party."

WHEREAS, Vision is willing to provide, and Customer desires to utilize Vision's Cloud Computing Service, on the terms and subject to the conditions set forth herein.

NOW, THEREFORE, in consideration of the foregoing premises and of the conditions and mutual covenants contained herein, and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the Parties hereto agree as follows:

1 Definitions

- 1.1 All capitalized terms used herein shall have the meanings attributed to them within the Agreement unless otherwise noted.
- 1.2 "Cloud Computing Service" shall mean any Service provided by Vision that allows Customer to access their data or software on Vision server(s).
- 1.3 "User" or "CAMA User" shall mean an employee of the Customer that was granted access to Customer's Vision 8 CAMA Database by the customer.
- 1.4 "Vision Server(s)" shall mean any server that is owned or licensed to Vision and made available to clients by Vision.

2 Hardware, Software, Services and Terms

- 2.1 Vision will provide sufficient space on Vision Server(s) for client's Vision 8 CAMA Database and Associated Documents.
- 2.2 Vision will install Client's Vision 8 CAMA database obtained and converted under CAMA Software Statement of Work (SOW) Agreement.
- 2.3 The terms and fees included in this Cloud Services Agreement are in addition to the terms and fees outlined in the SOW agreement, Annual Maintenance Agreement and Web Portal Public Access Agreement.
- 2.4 Vision will install all required server software including SQL.
- 2.5 Vision will set-up and configure 30-day rolling nightly backups of the CAMA Data and appropriate system files.
- 2.6 Customer will remain responsible to maintain their local intranet in good working order.
- 2.7 Customer will remain responsible to provide internet access with sufficient band width to all CAMA users.

Cloud Services Schedule Page 1 of 5

3 Term and Automatic Renewal

3.1 The term of this Schedule shall commence upon the later of (i) the installation of Vision 8 or (ii) the execution of this Schedule and shall continue for one (1) year ("Initial Term"). Thereafter, the term will continue with automatic renewals for four (4) additional successive one (1) year periods, unless written notice of non-renewal is delivered by either Party to the other not less than sixty (60) calendar days prior to the expiration date of the then-current term ("Renewal Term"). Both the Initial Term and any Renewal Term may be referred to collectively as the "Term."

4 Warranty

4.1 The Services Warranty as described within the Agreement shall be the exclusive warranty governing any Services provided within this Schedule.

5 Project Implementation Services

- 5.1 Vision shall provide installation instructions to install the necessary local interfaces to access the Software and Services. Vision shall provide assistance with the installation process as needed.
- 5.2 Customer shall promptly, upon completion of such installation, test the Installed Software using its data and notify Vision of any Defects or deficiencies.
- 5.3 Customer shall commence installation at its convenience once Vision has released to it the instructions for installation.

6 Customer Support

- 6.1 During the Term, upon and subject to the terms and conditions of the Agreement, the CAMA Software Statement of Work (SOW), and this Schedule, Vision will provide to Customer during Business Hours reasonable operational support and assistance as described in the Software Maintenance Agreement.
- 6.2 Vision shall use commercially reasonable efforts to respond to any request for support hereunder within one (1) business day of receiving such request. Vision strives for uptime of 99.9%.

7 Security

- 7.1 The Customer must keep confidential any of its passwords associated with the Software and Services. In addition, Customer must secure the hardware upon which the Software will be accessed using, antivirus software, malware protection software, or similar software protecting against malicious software, computer viruses, hijacking, or other offensive attack. A failure to adhere to the preceding statements will undermine Vision's efforts for securing the Customer's data stored on Vision's servers.
- 7.2 Vision's hosted solution includes nightly backups, firewalls, IP whitelisting, anti-virus / malware scanning, and user access restrictions and permissions.

Customer Restrictions and Responsibilities

- a) Customer is authorized to access and utilize Vision Servers to:
 - (1) Access, view, edit, maintain or otherwise utilize their CAMA data and Associated Documents
- b) Customer will not install or access any software or programs on Vision Servers without prior written approval from Vision.
- c) No 3rd Party access is allowed under this agreement. Customer will get prior written approval for all consultants, agents and other non-employee personnel that are requesting access to Vision Servers. Additional fees may be charged if Vision is required to grant access to any third parties, or if customer violates this provision.
- d) Customer will not utilize Vision Server(s) to access the internet without prior written approval, other than indirect internet access through the CAMA UI.
- e) Customer will ensure that its content will not violate any applicable law. Customer is solely responsible for the development, content, operation, maintenance, and use of its Content.
- f) We may suspend Customer's right to access or use any portion or all of the Service Offerings immediately upon notice to Customer if Vision determines:
 - (1) Customer use of Vision Service Offerings:
 - (a) Pose a security risk to the Service Offerings or any other customer,
 - (b) Could adversely impact Vision systems, the Service Offerings or Content of any other customer,
 - (c) Could subject Vision, our affiliates, or any other customer to liability, or
 - (d) Could be fraudulent
 - (2) Customer is in breach of this Agreement
 - (3) Customer is in breach of its payment obligations under this agreement

Other Exclusions

- Notwithstanding anything herein to the contrary, the Services to be provided hereunder shall not be covered by this Schedule, and shall be provided (if at all) on a time and materials basis, if the Software malfunctions due to:
 - a) A modification or alteration of the Software or Service not provided by Vision;
 - b) Use of the Software or Service in a manner for which it was not designed; or
 - c) The failure of Customer to fulfill any obligation under this Schedule or the Agreement.
- The procurement of and costs associated with third party software licenses including but not limited to 9.2 Microsoft Office Suite, ESRI, Marshall and Swift, etc. are excluded from this Schedule.

10 Fees and Payments

- 10.1 The fee for the Software and Services performed hereunder during the Initial Term shall be as follows ("Initial Fee"):
 - a) Initial Cloud Hosting Fee of Twenty-Four Thousand Seven Hundred Fifty Dollars (\$24,750.00)
- 10.2 The Initial Fee shall be due and payable in the first year upon the later of execution of this Schedule or thirty (30) days prior to the commencement of the Services hereunder, and must be paid in full prior to the commencement of Services hereunder. For each subsequent year of the Agreement, the applicable fee shall be paid in full at least thirty (30) days prior to the expiration of the current term.
- 10.3 Fees shall be fixed as set forth in this Agreement throughout the term of the Agreement.

11 Termination; Suspension of Service

- 11.1 Customer shall have the right to terminate this Schedule upon thirty (30) days written notice to Vision, provided that no such termination shall result in a refund to Customer of the Initial Fee or any Renewal Fee paid hereunder, nor shall it terminate the obligation to pay any remaining portions of the Total Initial Fee not yet invoiced, unless the termination is due to Vision's breach of terms and conditions of this Agreement.
- 11.2 Vision reserves the right to suspend the performance of Services under this Schedule if the Customer fails to pay the Initial Fee or any Renewal Fee within ninety (90) days of becoming due. During any such suspension, Services shall be restored once any outstanding Initial Fee or Renewal Fee has been paid in-full.
- 11.3 Any termination of the Agreement shall result in the immediate termination of this Schedule subject to the terms and conditions of the Agreement and this Schedule.
- 11.4 The termination of this Schedule shall be without prejudice to any rights of either Party against the other, and such termination shall not relieve either Party of any of its obligations to the other existing at the time of termination.

Cloud Services Schedule Page 4 of 5

By signing below, each party acknowledges that it has read this Schedule and the Agreement to which it is attached, understands them, and agrees to be bound by their terms and further agrees that they are the complete and exclusive statement of the agreement between the parties, which supersedes and merges all prior proposals, understandings, and all other agreements, oral or written, between the Parties relating to the subject matter of this Schedule. This Schedule may not be modified or altered except by a written instrument duly executed by both parties.

FURTHER, each Party has full power and authority and has been duly authorized to enter into and perform its obligation under this Agreement, including Licensee's authority to enter into an agreement of this scope and duration, all necessary approvals having been obtained. The execution, delivery and performance of this Agreement by each Party shall not violate, create a default under or breach of any charter, bylaws, agreement or other contract, license, permit, indebtedness, certificate, order decree or security instrument to which such Party or any of its principles is a party or subject to.

In witness whereof, the Parties hereto have hereunto set their hands and seals as of their respective dates written below.

Customer:	Vision:	
City of Norfolk, Virginia	Vision Government Solutions, Inc.	
810 Union Street	1 Cabot Road	
Norfolk, VA 23510	Hudson, MA 01749	
Signature:	Signature:	
DocuSigned by:	Docustigned by:	
Michael Bevis	Diane Basile, CFO	
	P _V .	
By: Michael Bevis	By: Diane Basile, CFO	
Title: Chief Procurement Officer	Title: Scro	
	· · · · · · · · · · · · · · · · · · ·	
Date:	Date:	
Date: 3/28/2022 6:41 AM PDT	3/27/2022 5:16 PM EDT	

OVISIONGOVERNMENT SOLUTIONS

Computer-Assisted Mass Appraisal and Land Records Management Software:

City of Norfolk, Virginia RFP 9230-0-2022/ML

Due Date: December 13, 2021



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RFP 9230-0-2022/ML

Computer-Assisted Mass Appraisal and Land Records Management Software

Issuing Office: Office of the Purchasing Agent Attn: Mia Lorenz 810 Union St., Suite 303 Norfolk, VA 23510 V: 757-823-4585 Mia.lorenz@norfolk.gov

Issued: November 1, 2021

RFP OPENING DATE AND TIME: December 13, 2021 2:00 p.m. Eastern Time

THE UNDERSIGNED AGREES TO PERFORM ANY CONTRACT AWARDED AS A RESULT OF THIS RFP, IN ACCORDANCE WITH THE REQUIREMENTS OF TERMS & CONDITIONS SPECIFIED HEREIN. THE SIGNATURE BELOW SHALL BE PROVIDED BY AN AGENT AUTHORIZED TO BIND THE COMPANY. FAILURE TO EXECUTE THIS PORTION MAY RESULT IN REJECTION OF THE OFFERORS PROPOSAL.

Offeror Legal Name:	Vision Government Solutions
Virginia State Corporation Commission Number:	F151442-3
Offeror Contact Name:	David Hickman
Offeror Address:	1 Cabot Road, Suite 100, Hudson, MA 01749
Offeror Contact Telephone Number:	804-347-7858
Authorized Agent Signature:	1) Bass
Authorized Agent Name (Printed):	Diane Basile
Authorized Agent Title:	Chief Financial Officer
Authorized Agent Contact E-mail:	dbasile@vgsi.com
Agent Contact Phone:	508-351-3693
Date of Proposal:	12/13/2021



Cover Letter

Vision Government Solutions 1 Cabot Road, Suite 100 Hudson, MA 01749

December 13, 2021

City of Norfolk, Virginia 810 Union St., Suite 303 Norfolk, VA 23510

Dear Mia Lorenz.

Vision Government Solutions, Inc. (Vision) is both pleased and proud to submit this proposal for the **Computer-Assisted Mass Appraisal System for the City of Norfolk, Virginia.** Vision is proposing a comprehensive implementation and support solution for our state-of-the-art *Vision 8* Computer-Assisted Mass Appraisal (CAMA) System, including product, installation, implementation, training, and continuing service.

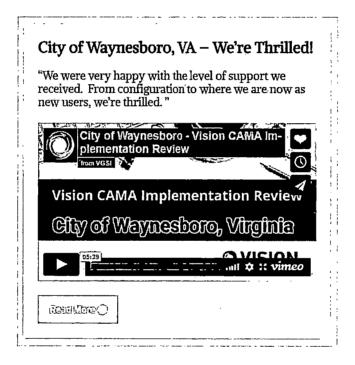
In summary, Vision Government Solutions is a uniquely qualified and experienced firm that has:

- **Demonstrated customer happiness** with more than 450 customers, 50% of whom have been with Vision for more than 20 years. Our CAMA software has been tried and tested by hundreds of communities, including the largest city in the country (New York City at 1.1 million parcels) and the nation's capital (Washington, DC).
- A deep and unparalleled commitment to Virginia: With 29 Customers in Virginia,
 Vision is proud to serve more Virginia communities than any other CAMA vendor.
 Vision has deep experience and expertise implementing successful CAMA systems across
 the Commonwealth, and we are devoted to supporting our Virginia community. This
 experience makes us well-versed in the unique requirements and needs of the
 Commonwealth.
- Proven experience successfully implementing CAMA systems in counties of comparable size and with similar challenges (e.g., City of Chesapeake, Henrico County, Dinwiddie County, Prince George County, Albemarle County, City of Charlottesville, and many others in Virginia), including proven experience seamlessly converting ProVal clients in Virginia to Vision.



A proven implementation process that makes our implementations, on average, three times faster and significantly more cost competitive than our competitors. In the last three years, every Vision implementation in Virginia has been 6 months or less, including Augusta County, City of Williamsburg, Wythe County, City of Falls Church, Prince George County, Essex County, and City of Waynesboro. Reviews of our happy recent implementations can be found at www.vgsi.com/testimonials

For this reason, Vision is confident that we can meet (and significantly exceed) the City's desired go-live of July 1, 2023. Should a contract be executed by March 2022, Vision could be ready to deploy as early as the end of the 2022 calendar year.



- A robust, user friendly and proven out-of-the-box CAMA system that fits the needs of Virginia. The flexibility of the Vision CAMA system enables deep levels of personalization and configuration within the Commercial Off-the-Shelf system, reducing costly and risk software development while still enabling the County to customize its workflows through the system.
- Demonstrated financial stability and strength, with more than thirty-five years of consecutive business operations
- A full-service commitment to providing maintenance and services to enable the successful deployment of our CAMA system, including installation, implementation,

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training, and continuing support over time. This includes the strongest Customer Support in the industry.

 A strong long-term partnership with the City's existing mobile provider, Data Cloud Solutions, including in communities as large as New York City

The Vision CAMA System will provide the City of Norfolk with a CAMA system that will deliver the optimum in system performance, growth, flexibility, reliability, user friendliness, and valuation accuracy. In addition, Vision's product maturity for Virginia and our experience with similar CAMA conversions will enable us to provide our software and services significantly faster and more cost competitively than other providers.

The primary contact throughout the project is:

David Hickman
Vice President of Sales and Marketing
Phone: 804-347-7858
Email: dhickman@vgsi.com

We thank you for your consideration and look forward to the opportunity to continue the conversations and collaborate with the City of Norfolk on this important endeavor.

Sincerely,

Diane Basile

Chief Financial Officer

Vision Government Solutions, Inc.



III. Experience in Providing Similar Services

Vision Company History

Vision is proud to have served Assessing Departments since 1985, with 35 years of consecutive business operations.

In that time, we have served more than 450 municipalities across the United States, ranging from 250 parcels to 1.2 million parcels.

Vision's full portfolio of services includes CAMA software, Tax Administration and Collection software, software implementation and maintenance servers, and Appraisal services, providing a full-service firm for all Assessing Department needs.

Vision is proud to be specially positioned as the only vendor small enough to hear your voice at the highest level of our organization, while still providing the stability, longevity, and continued product investment of a larger national firm.

Our Commitment to Customers: The Vision Partnership Approach

Vision commits to building long-term partnerships built to last.

We are especially proud to share that more than 50% of our customers have been with Vision for more than 20 years. In addition, of our 450+ customers, 376 have upgraded to our latest platform, the proposed Vision 8, in the last three years (and growing).

This high adoption is rooted in user-friendly software and dedicated customer support, which our team provides at every stage, from implementation to training to long-term support. Vision is proud to offer white-glove customer service, complete with a dedicated Customer Success Team, a fully staffed Customer Support Help Desk, online help resources, annual regional and

national User Groups, and monthly training webinars, among many more continuous learning options.

As an example, we build customer collaboration into every step of the implementation process, from providing a beta database review period to collaborating on our online Project Management platform, Basecamp. This is why every Vision implementation in the last two years has been completed in 6 months or less!

OUR WINNING COMBINATION

- ✓ INDUSTRY LEADING TECHNOLOGY
- **FULLY INTEGRATED MOBILITY**
- ✓ STRONG CLIENT BASE
- PROVEN IMPLEMENTATION **METHODOLOGY**



A Full-Service Firm for Longevity

An experience and qualified firm, Vision has demonstrated longevity and financial stability, with:

More than 35 years of consecutive business operations (in business since 1985).

The ability and commitment to provide future maintenance and services (Vision is a fullservice firm offering both desktop and mobile products, installation, implementation, training, and continuing service under a sole source agreement).

A broad and skilled staff of more than 300 employees, including a Data Engineering team, a Project Implementation team, a Customer Support team, and an Appraisal team with more than 170 members who complete over 100 reassessments per year.

A deep commitment to continuous improvement of implementation efficiencies. In fact, every Virginia Vision implementation in the last three years has been completed in 6 months or less.

Proven experience in providing similar implementation services to comparable counties of the same size, with similar scope of functionality and technical complexity.

The average Vision software customer has been with us for more than 20 years, demonstrating our commitment to long-term partnership.

The broader Vision community benefits from the financial stability and product innovation driven by flagship Vision users such as Washington, D.C. the City of Chesapeake, County of Henrico, and New York City.



Similar Projects

City of Chesapeake, VA (100,000 parcels; client since 2013)

Document 1-2

Greg Daniels, CAE, Real Estate Assessor (757) 382-6756 gdaniels@cityofchesapeake.net

The City of Chesapeake, VA is Virginia's third largest city and has been utilizing Vision's CAMA platform since 2013. Vision is proud to share that Chesapeake chose to upgrade to Vision 8 in 2019. Chesapeake has been an extremely strong partner with Vision and most recently was awarded the IAAO Certificate of Excellence in Assessment Administration in 2019. Vision and Chesapeake recently collaborate on our Digital Future of Assessing webinar series to highlight Vision 8's GIS functionality. Read more about Chesapeake's experience with Vision below:

Every Assessor hopes when they purchase a CAMA system that the vendor will meet their. expectations such as a successful conversion and receive a product that works as advertised. My experience with Vision CAMA system has exceeded my expectations. We received a successful conversion and were able to go live ahead of schedule. The product works as promised and they continue exceeding expectations by releasing enhanced versions utilizing customer feedback. I have been in the assessment field for over 30 years and working with Vision has been the best customer experience to date."

Greg Daniels, CAE

Real Estate Assessor City of Chesapeake, VA

Essex County, VA (10,057 parcels; client since 2019)

Thomas Blackwell, Commissioner of the Revenue 804-443-4737 tblackwell@essex-virginia.org

Essex County, Virginia was implemented in 2019 by the same Project Management team proposed for the City of Norfolk. Vision is pleased to be partnering with Essex County's Commissioner of the Revenue on a recent IAAO presentation titled "DIY Database Decluttering."



City of Waynesboro, VA (15,046 parcels; client since 2019)

Document 1-2

Mary Garris, Assessor Office: (540) 942-6722

garrismg@ci.waynesboro.va.us

The City of Waynesboro signed to move to Vision CAMA in July of 2019 and was implemented by February of 2020. In their post-implementation review, they left the following comments:

Why did you choose Vision?

After working with the same software for nearly twenty years, we were impressed with the level of functionality vision offered and excited to see how that could help us improve and advance our current assessment practices. After learning of so many satisfied users in surrounding localities, we were excited to hop on board.

How would you say Vision compares to your community's previous CAMA System?

Vision has taken multistepped processes back to one. Although we are still very new users, we all agree so far that vision is more user friendly than our previous syštem.

What are some things you think the platform does

As new users (Go-Live date 3/3/20), we haven't had much time to move around in the system, but we're really excited about the ability to easily produce a list of comparable sales. The ability to create and customize groups and dashboards is also a huge asset to our day to day functions.

Vision is the fastest growing CAMA provider in Virginia. Would you recommend Vision CAMA to other Virginia communities?

At this point, we would not hesitate to recommend Vision to other Virginia communities.

(continued below)

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Vision markets our CAMA system as a flexible, out of the box solution that's powerful enough to be configured for any community. Would you say that's a fair statement?

we would absolutely agree!

Vision's standard implementation process is 5 months from start to finish. How did we do?

From Purchasing to IT to our office, we've all been impressed with the process. From contract negotiations to go live, the process was smooth and anyone we needed at any point, made themselves available.

How would you rate us from a project management perspective?

Project management was top notch, we were lucky enough to be matched with ven Rukstela. She was a great fit for our locality. Her experience on the assessment side helped us make decisions regarding future business practices that we may not have thought to consider as we were working to make so many other decisions.

She's organized, driven, and very detail oriented. Add to that her excitement about the product and service she's providing along with her love of a problem-solving challenge, it's hard to have anything but confidence in the project management side!

Were you happy with the level of support you received during your implementation?

we were very happy with the level of support we received. From configuration to where we are now as new users, we're thrilled. Dylan was assigned as our designated Account Manager and was here for our go live day and the two training days after. Hatt was on-site with us two days after go live for training and one-on-one assistance.

Their presence and knowledge about vision left us feeling far more confident in ourselves and our new software than we thought we would be two days in.

Were there any unique aspects about your community or your data that needed to be considered during your implementation?

we had "attached map numbers" that weren't initially recognized in Vision because of the way they were housed in the previous software. After a few three-way calls and brainstorming sessions with IT and Jen, she was able to find a solution and work with the data engineers to make it work. Impressive!

What's the one thing you wish you knew before undergoing your conversion, and do you have any advice for future clients preparing for an implementation?

After just going through the implementation process, we would say involvement and communication with your project manager is key. If they don't know your struggles, they can't help you find a solution.

Filed 04/17/25



City of Williamsburg, VA (4,628 parcels; client since 2019)

Derek Green, City Assessor Office: (757) 220-6184 dgreen@williamsburgva.gov

"We signed our Vision 8 contract on January 15th and were live by May 31st. I don't know how much better you can get than that, it is my understanding it was the fastest Vision Virginia conversion. Our IT Director Mark Barham has been with the city for quite some time and the conversion from his perspective was the best he's ever been a part of. We both attribute that to excellent project management by Jen and a highly configurable platform.

This was actually my second legacy conversion to Vision lead by Jen Rukstela having also gone through this over in Gloucester County before I started as the Assessor here in Williamsburg and I can tell you that your team has really got this process down now. We had very few hiccups and Larry Ingram, the data engineer for our project was fantastic. You've really got a top-notch team over there, and I wouldn't hesitate to recommend this system to other folks here in Virginia who may be looking for something new."

Derek Green

City Assessor City of Williamsburg, VA

New York City, NY (1.2 million parcels; client since 2007)

Howard Wong, Director of Property Assessment Technology

Office: (212) 291-2572

WongHoward@finance.nyc.gov

New York City has been utilizing Vision's CAMA platform for over 13 years for all of their assessing needs. Chosen for its ability to handle larger, more complex municipalities, Vision integrates with New York City's mobile provider, Data Cloud Solutions, to assess the million plus parcels that make up the city. NYC recently signed with Vision to upgrade to Vision 8, including a 5-year software maintenance agreement.

District of Columbia Uses Vision CAMA to

We felt very strongly that the model we had designed within Vision and the flexibility of the tools at our

Achieve IAAO's CEAA

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Washington, D.C (180,000 parcels; client since 2001)

Vladimir Jadrijevic, Director of Real Property Phone: (202) 442-6784 vladimir.jadrijevic@dc.gov

Washington D.C. has been a Vision client for over 19 years, utilizing the Vision CAMA platform to assess properties within the Nation's capital. As Vladimir Jadrijevic noted, this partnership has recently helped Washington D.C. accomplish their goal of earning the IAAO Certificate of Excellence in Assessment Administration in 2019 by providing the "best technology out there and the best partners out there."

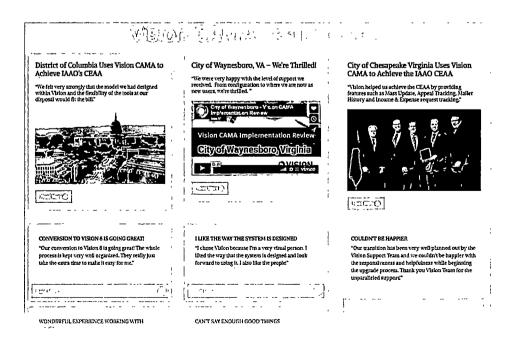
disposal would fit the bill." Carling()

We invite you to read more about Washington D.C.'s partnership with Vision online at our website: www.vgsi.com/testimonials

Additional References

Vision is proud to support our user community, and we often partner with users on webinars, testimonials, and resources for the broader Assessing Community.

We invite you to view our latest customer references at www.vgsi.com/testimonials





List of All Current Virginia Vision CAMA Clients

Document 1-2

Vision has been in business since 1985 and has over 450 clients (counties, towns, and cities) across the country. We are proud to report that more than 50% of our customers have been with us for more than 20 years. We have provided below our list of Virginia clients, all of whom have Vision CAMA. (We consider our full client list proprietary and would be happy to provide in a non-public format).

Community Name	State
Albemarle County	VA
Augusta County	VA
Charlottesville City	VA
Chesapeake City	VA
Culpeper County	VA
Dinwiddie County	VA
Essex County	VA
Falls Church	VA
Gloucester County	VA
Halifax County	VA
Hanover County	VA
Harrisonburg City	VA
Henrico County	VA
Henry County	VA
King William County	VA
Manassas City	VA
Martinsville City	VA
New Kent County	VA _
Northampton County	VA
Poquoson City	VA
Portsmouth City	VA
Prince George County	VA
Salem City	VA
Staunton City	VA
Suffolk City	VA
Waynesboro	VA
Williamsburg City	VA
Wythe County	VA
York County	VA

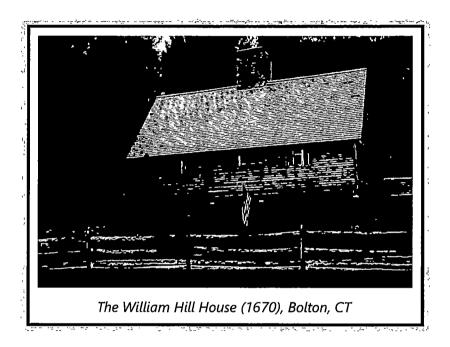


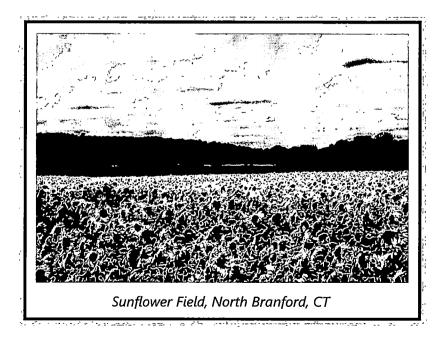
List of All Current Vision CAMA Clients

Vision has been in business since 1975, and we are proud to report that more than 50% of our customers have been with us for more than 20 years.

Document 1-2

Community Name	State
Andover	СТ
Barkhamsted	СТ
Berlin	СТ
Bethlehem	СТ
Bloomfield	СТ
Bolton	СТ
Branford	СТ
Bridgeport	СТ
Bridgewater	СТ
Bristol	СТ
Brookfield	СТ
Brooklyn	СТ
Burlington	СТ
Canaan .	СТ
Canterbury	СТ
Chaplin	СТ
Clinton	СТ
Colchester	СТ
Colebrook	CT
Cornwall	СТ
Coventry	СТ
Danbury	СТ
Deep River	СТ
East Granby	СТ
East Haddam	СТ
East Hampton	СТ
East Hartford	СТ
East Lyme (Niantic)	СТ
Enfield	СТ
Essex	СТ
Fairfield	СТ
Glastonbury	СТ
Goshen	СТ
Granby	СТ



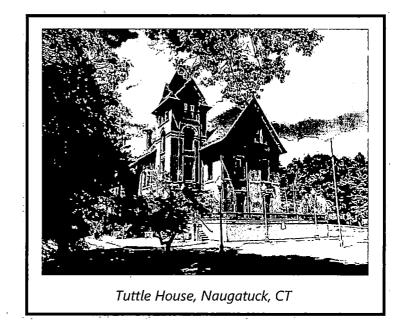


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Griswold	СТ
Haddam	СТ
Hamden	СТ
Hampton	CT
Harwinton	СТ
Kent	CT
Lebanon	СТ
Ledyard	СТ
Lisbon	CT
Litchfield	CT
Lyme	CT
Madison	СТ
Manchester	CT
Mansfield	СТ
Mariborough	СТ
Middlebury	СТ
Middlefield	СТ
Middletown	СТ
Milford	CT
Monroe	СТ
Morris	СТ
Naugatuck	СТ
New Britain	CT
New Fairfield	СТ
New Hartford	CT
New Haven	CT
New London	CT
New Milford	CT
Newtown	СТ
Norfolk	СТ
North Branford	СТ
Norwalk	СТ
Norwich	СТ
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Orange	СТ
Oxford	СТ
Plainfield	СТ
Pomfret	СТ
Preston	СТ
Putnam	СТ

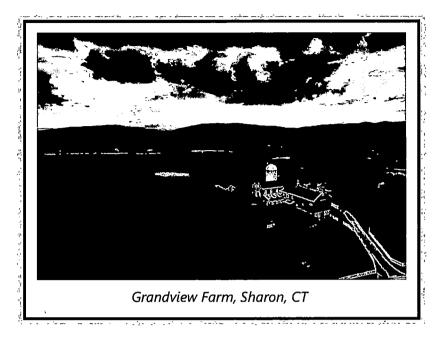


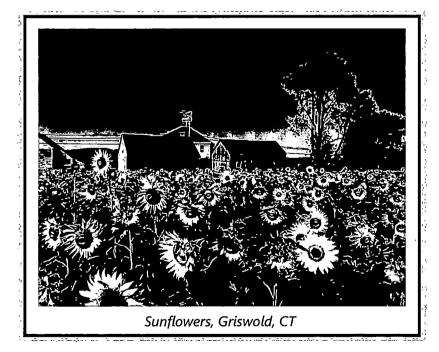


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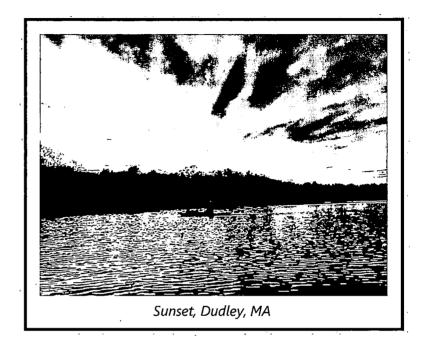
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Sharon	СТ
Somers	СТ
South Windsor	СТ
Southbury	СТ
Southington	СТ
Sprague	СТ
Stafford	СТ
Stamford	СТ
Stonington	СТ
Stratford	СТ
Thompson	СТ
Tolland	СТ
Trumbull	СТ
Union	СТ
Wallingford	СТ
Waterford	CT
West Hartford	СТ
West Haven	СТ
Westbrook	СТ
Westport	СТ
Willington	СТ
Wilton	СТ
Winchester	СТ
Windham	СТ
Windsor	CT
Wolcott	CT
Woodbridge	СТ
Woodstock	СТ
Washington	DC
Lake County	FL
Pasco County	FL
Putnam County	FL
Sumter County	FL
Taylor County	FL
Abington	MA
Acton	MA
Agawam	MA

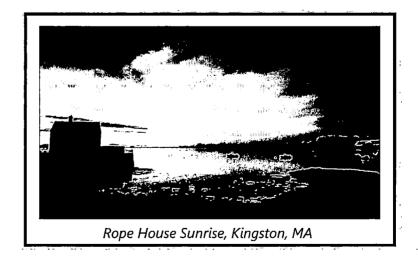




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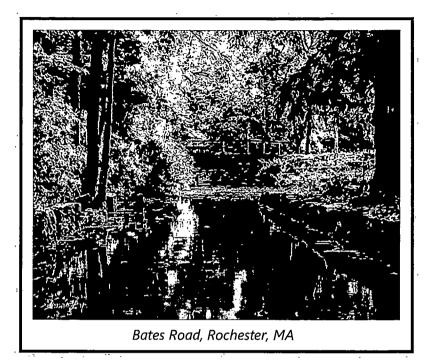
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Barre	MA _.
Berlin	MA
Blackstone	MA
Boxford	MA
Boylston	MA
Cambridge	MA
Chelmsford	MA
Chelsea	MA
Chicopee	MA
Clinton	MA
Concord	MA
Dartmouth	MA
Dedham	MA
Dracut	MA
Dudley	MA
Duxbury	MA
East Brookfield	MA
East Longmeadow	MA
Easthampton	MA
Easton	MA
Edgartown	MA
Foxborough	MA
Gardner	MA
Georgetown	MA
Gloucester	MA
Gosnold	MA
Grafton	MA
Granby	MA
Groton	MA
Hadley	MA
Hampden	MA
Hanover	MA

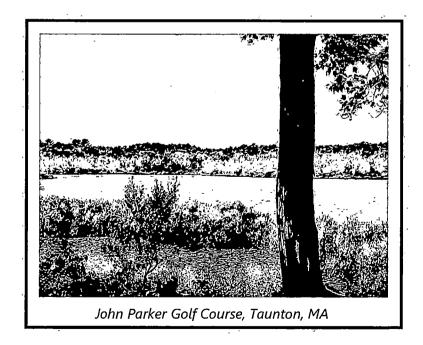






	- -
Harvard	MA
Hingham	MA
Hinsdale	MA
Holden	MA
Holland	MA
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Hudson	MA
Kingston	MA
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Middleborough	MA
Millbury	MA
Millis	MA
Monson	MA
Nantucket	MA
New Salem	MA
Newburyport	MA
Newton	MA
Norfolk	MA
North Attleborough	MA
Northbridge	MA
Norwell	MA
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Oxford	MA
Palmer	MA
Paxton	MA
Pelham	MA
Petersham	MA

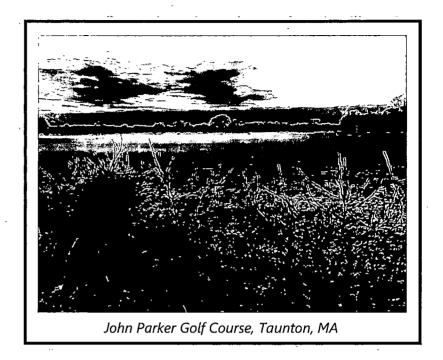


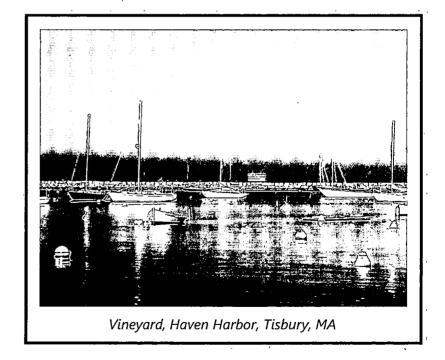


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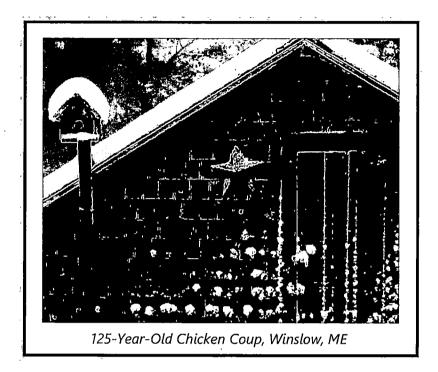
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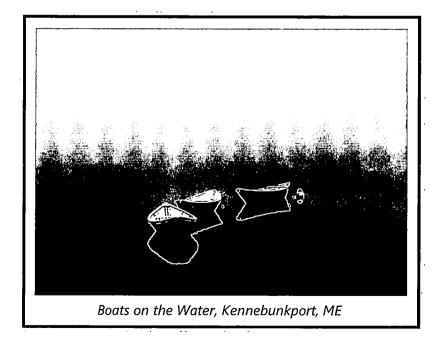






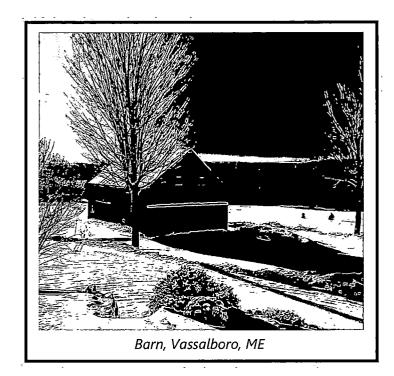
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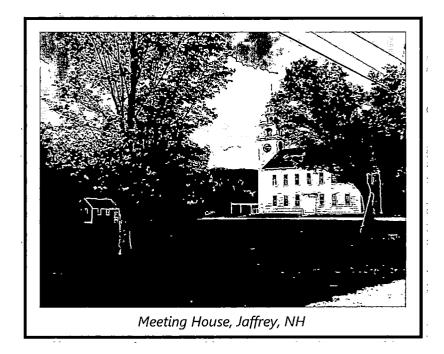






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Standish	ME
Topsham	ME
Waterville	ME
Wells	ME
Westbrook	ME
Windham	ME
Winslow	ME
Winthrop	ME
Yarmouth	ME
York	ME
Bloomington	MN
Chisago County	MN
Hennepin County	MN
Acworth	NH
Amherst	NH
Bedford	NH
Belmont	NH
Berlin	NH
Bethlehem	NH
Bow	NH
Bridgewater	NH
Candia	NH
Charlestown	NH
Chesterfield	NH
Claremont	NH
Concord	NH
Derry	NH
Dunbarton	NH
Durham	NH
Epping	NH
Exeter	NH
	

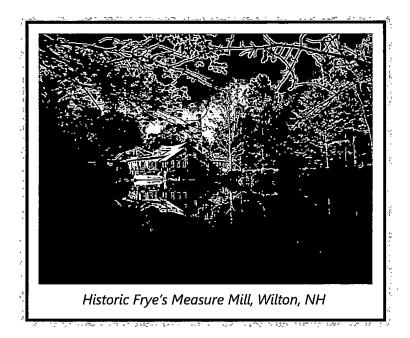


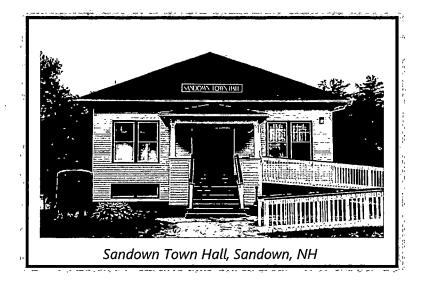


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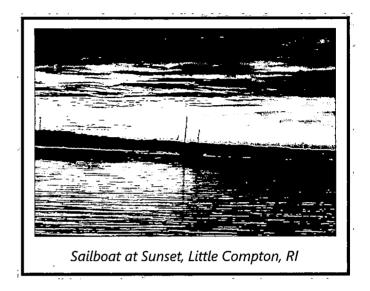
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Londonderry	NH
Lyme	NH
Manchester	NH
Meredith	NH
Milford	NH
New Durham	NH
Newington	NH
Newmarket	NH
North Hampton	NH
Pelham	NH
Pembroke	NH
Plaistow	NH
Portsmouth	NH
Raymond	NH
Rochester	NH
Rye	NH
Salem	NH
Sandown	NH
Seabrook	NH
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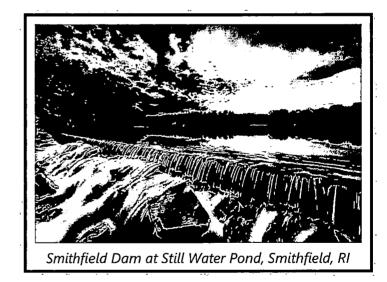




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Warren County	PA
Charlestown	RI
Cranston	RI
Cumberland	RI
East Providence	RI
Exeter	RI
Foster	RI
Glocester	RI
Hopkinton	RI
Johnston	RI
Lincoln	RI
Little Compton	RI
Middletown	RI
New Shoreham	RI
North Kingstown	R!
Pawtucket	RI
Portsmouth	RI
Providence	RI
Richmond	RI
Smithfield	RI
South Kingstown	RI
Warwick	RI
Westerly	RI
Woonsocket	RI
Albemarle County	VA
Charlottesville City	VA
Chesapeake City	VA
Culpeper County	VA
Dinwiddie County	VA
Essex County	VA
Falls Church	VA
Gloucester County	VA
Halifax County	VA
Hanover County	VA
Harrisonburg City	VA
Henrico County	VA
Henry County	VA
King William County	VA
Manassas City	VA

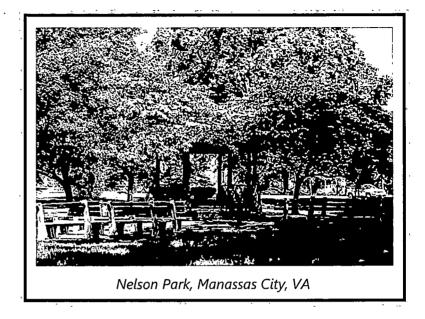


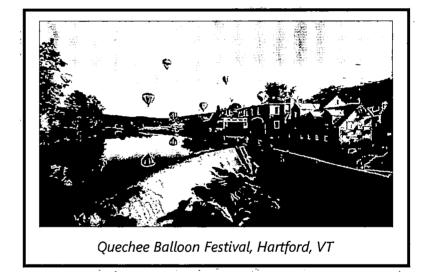


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Martinsville City	VA
New Kent County	VA
Northampton County	VA
Poquoson City	VA
Portsmouth City	VA
Prince George County	VA
Salem City	VA
Staunton City	VA
Suffolk City	VA
Waynesboro	VA
Williamsburg City	VA
Wythe County	VA
York County	VA
Bridgewater	VT
Colchester	VT
Hartford	VT
Newport City	VT
Pittsford	VT
Stratton	VT
West Rutland	VT
Waukesha City	WI





Photos submitted by the Vision community for our annual wall calendar.



IV: Experience of the Project Team

Vision is proud to propose a project team that comprises a hand-picked combination of skillsets required for a successful conversion from the legacy ProVal CAMA platform to Vision 8.

The Vision Implementation Project Team provides the following benefits to the City:

- Expertise and track record of successfully converting other ProVal users (recent similar conversions in Prince George, Falls Church and Clinton County PA)
- Deep data engineering skillsets to aide in successful data conversion
- Subject Matter Experts in assessing and appraisal
- Strong customer support and technical support skillsets that ensure the entire Norfolk team will receive continued support long after the Vision CAMA implementation is complete

Proposed Management Team

NAME	ROLE	QUALIFICATION HIGHLIGHTS
JENIFER RUKSTELA	Senior Director – Project Management Office	 Successfully converted more than two dozen legacy systems to Vision 8 in the past 10 years Successfully completed ProVal conversions Every implementation in the last 2 years has been completed in 6 months or less Over 20 years of appraisal experience Tenured at Vision since 2006 Knowledgeable in project management best practices, data conversion methods, and data mapping PMP, PMI-ACP, CCMA I
DYLAN DIGERONIMO	Project Manager	 Began at Vision as a Customer Support Representative, developing deep familiarity with Vision CAMA and customer needs Successfully delivered more than two dozen Vision CAMA upgrades in the last year Successfully project managed a 1.2 million parcel jurisdiction Uses a unique skillset of project prioritization to guide clients and aid internal stakeholders during the conversion process.

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VISIONGOVERNMENT SOLUTIONS



LIZ OBRINGER	Business Analyst	 10 years tenure in Customer Support and Software Analysis at Vision Experienced with mapping and testing new CAMA databases and interfaces Supports the Project Team analytically Conducts internal and external project review sessions
SCOTT MAHONEY AND CUSTOMER SUPPORT TEAM	Senior Director of Customer Operations	 Lead Customer Support organization, resolving 75+% of requests same-day, and live-answering 99% of phone calls 6 years tenure in Customer Support at Eze Software B.A. from Bowdoin College
COREY CLARK AND DATA ENGINEERING TEAM	Data Engineering Team Lead	 Corey leads the Vision Data Engineering team, supported by 5 Data Engineers The Data Engineering team has successfully upgraded 350+ Vision customers from legacy Vision systems to Vision 8 in the last two years The Data Engineering team has successfully converted more than two dozen new Vision communities in the last two years Corey and his team are focused on creating time-savings efficiencies to dramatically reduce conversion times
EMILY TEAGLE	Business Analyst	 Responsible for data mapping, data mining, and data analysis while also building out custom valuation processes 5+ years of experience working in King William County, VA as a Senior Fiscal Specialist, Deputy Commissioner of the Revenue & Land Use Technician B.A. from Western Governors University Virginia resident
VIRGINIA SUBJ EXPERTS RYAN BRUCE WO	DAVIS AND	 Vision currently employs two former Virginia assessors who will serve as Subject Matter Experts for this implementation. Both were former presidents of the VAAO Bruce Woodzell is a former president of the IAAO These Virginia residents will help advise in Virginia statute, Marshall & Swift, supplementals and abatements, commercial valuation, and more.

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Project Staffing Resumes



GOVERNMENT SOLUTIONS

Summary

Performance driven professional with progressive experience in technology project consulting, software implementation management and data conversion. Recognized for outstanding time management and communication skills with demonstrated success in organizing cross-functional resources to execute multi-phase projects within tight timelines while ensuring quality of output. Track record for meeting deliverable dates, budgets, and SLAs. Exceptional architecture instincts augmented from years of training and hands-on experience leading technical project implementations.

Education

Southern New Hampshire University Bachelor of Science, Data Analytics, 4.0

International Sports Science Association

Associates of Science, Exercise Science. 4.0

Memberships:

Project Management Institute International Association of Assessing Officers

Certifications

PMI Project Management Professional (PMP) – Certificate #2702092

PMI Agile Certified Practitioner – Certificate #2600233

CT Certified Assessment Supervisor – Certificate #753

Jenifer Rukstela

Project Manager

Professional Experience

Vision Government Solutions, Hudson, MA Senior Director – Project Management Office

2021 - Present

Responsible for servant leadership and oversight of all CAMA and Tax software projects and processes. Successfully implementation of over 75 new client projects.

- Ongoing cross-department collaboration to orchestrate successful implementation projects that align with the Vision virtues
- Spearhead continuous improvement initiatives incorporating Lean Six Sigma tools and techniques to enrich project methodologies and align on-time delivery with quality to surpass customer expectations
- Promote a spirit of Kaizen to all project team members while guiding constructive conflict to eliminate waste and bottlenecks and celebrate the success of high-performing teams
- Develop, maintain, and promote living process documentation that evolves with the company and the Project Management Office
- Integrate Agile and Waterfall project management methodologies to support and guide team members throughout the project management lifecycle
- Manage the interdependence across projects and project teams and report both aggregate and detailed performance to relevant stakeholders
- Promote the ongoing growth and education of project team members and the PMO as a whole

Project Manager - Software Implementation

2009- 2021

Responsible for project management, data analysis, cost model calibration and consulting for software implementations for an innovative assessment platform provider. Project implementations include New England, VA, PA, CT, MA, NH, and ME

- Engage with clients and internal teams to ensure that software implementation
 efforts are aligned with unique customer needs, project timelines, and budget
 expectations, while instituting project management methodologies to achieve
 high productivity and cost efficiency levels
- Establish standards, automated processes, and enhanced procedures to streamline data flow and communication across teams; actively develop approaches and frameworks to enhance data quality/integrity and tune SQL queries
- Facilitate virtual working sessions to obtain input from multi-disciplinary teams consisting of developers and end-users to define data requirements and document application structures
- Evaluate implementation requests including performing scope reviews, gathering business requirements, understanding future state design, and build activity analysis



Certified Connecticut Municipal Assessor 1 – Certificate #1576

Training:

Management for IT Professionals

Oracle Database 11g: Introduction to SOL

Microsoft SQL Server 2008 – Transact SQL

New Technology for Real Estate Appraisers

Real Estate Finance Statistics and Valuation Modeling

Real Estate Principles & Practices

Appraisal I & Appraisal II

Evaluating Residential Construction

IAAO Standards of Professional Practice and Ethics

IAAO Fundamentals of Real Property Appraisal

IAAO Income Approach to Value USPAP

Jenifer Rukstela

Project Manager

- Structure governance processes for implementation architecture, oversight and engagement; create a disciplined project management environment based on speed of decision-making and project visibility
- Improve the planning, prioritization and execution of work streams and identify project bottlenecks
 Selected Projects:
- Fast-tracked a client full implementation and revaluation project from 18 months
 to 6 months; oversaw data conversion and then led all aspects of project
 including managing data collectors, field reviews, sales analysis and valuation,
 testing, and launch
- Assigned to turnaround a complex trouble project operating in an unstable environment; developed a project plan to meet clients go-live date and executed all tactical elements of project including conversion, interface development, and training

Project Manager - Appraisal

2006 - 2009

Managed various phases of projects including conducting current state assessments, gathering requirements, definitions and functional specifications, documentation, statistical reporting, calendar management, and timelines.

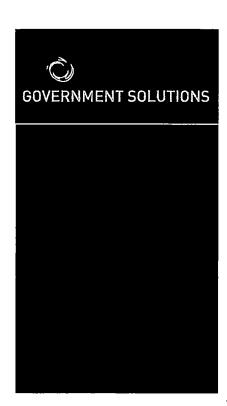
- Partnered with cross-functional resources to understand, implement and manage project life cycles; led project status updates, ensured meeting actions were documented and delivered projects on-time, on budget, and within scope
- Oversaw quality assurance, feasibility studies and release schedules while using project management techniques to improve planning, prioritization, and the tactical execution
- Directed multiple project requests simultaneously and prioritize based on business and client needs; ensured lines of communication remained open, objectives were clearly communication, and deadlines were met

Town of Manchester, Manchester, CT Assistant Assessor

2003 - 2005

Reviewed and determined tax assessments for property utilizing market, cost and comparable sales data.

- Investigates and reviews real property assessment challenges at the administrative and judicial stage
- Gathered real property and data from various sources, including field data, property owners, contractors, protest applications, trade journals, income and expense reports, and market sales and listings
- Investigated, advised and explained the contents of deeds, mortgages, leases, surveys, and other related documents
- Interpreted maps, surveys, building plans, and construction



Jenifer Rukstela

Project Manager

Lesher Glendinning Municipal Services, East Haven, CT Senior Appraiser

2001 - 2003

Appraisal of residential properties and data verification of commercial and residential employees. Assisted with training of colleagues in data collection and valuation techniques.

CLT, Tolland, CT

Data Collection Supervisor

2000 - 2001

Supervised residential data collection, data entry, and performed quality control. Assisted with residential valuation review. Enter orders and returns as needed





Education

College of the Holy Cross Bachelor of Arts, Political Science & Philosophy Worcester, MA May 2016

Certifications

IAAO 101 Fundamentals of Real Property Appraisal 2021

32 Hour Mediation Training from Mediation Services of North Central MA, Inc. 2017

Community mediation training that focused on the Principles of Mediation, Conflict Resolution, Active Listening, and Levels of Power within the mediation, confidentiality and writing an effective mediation agreement.

Dylan J. DiGeronimo

Project Manager

Professional Experience

Vision Government Solutions, Hudson, MA

Project Management Associate

January 2020 - Present

- Managing the New York City Vision CAMA Upgrade Project across internal and external teams. Overseeing version upgrade and NYC feature functionality enhancements.
- Successfully upgrading customers from Vision 6.5 to Vision 8
- Coordinating timelines and due dates across a Project Management software keeping an in-tact project plan in accordance with client specifications.
- Facilitating and prioritizing project requests from the client and internal stakeholders so they are taken care of in the most efficient manner.

Customer Support Engineer

March - December 2019

 Developed knowledge of the Vision CAMA system to be able to identify, triage, and solve issues relating to the software, client knowledge, training, bug fixes and enhancement requests.

The Twenty First Century Group, Washington, D.C. Intern

April 4 – July 13, 2018

- Performed client-related tasks such as media outreach, background research, drafting memos, database management, and calling Congressional offices.
- Accompanied Lobbyists to meetings at the House of Representatives and Senate Office Buildings.
- Completed administrative duties including copying, filing, and scanning/faxing office documents.
- Helped with general set up and break down of events, took photos and assisted with guest services.

Pawlak and Higgins, LLC, Fitchburg, MA Paralegal/Legal Assistant

2017 - 2018

- Performed administrative tasks and coordinated office activities such as filing, scheduling meetings, reviewing and sorting mail and other correspondence, creating client files, preparation of witness lists, exhibits and trial binders, and subpoena delivery.
- Interacted with clients via telephone, email and office visits in order to relay pertinent information concerning their cases.
- Conducted research and documented information relevant to active cases.
- Assisted attorneys with arranging and reviewing legal documents for accuracy.



Education

Quinsigamond Community College Worcester, MA
Associate of Arts -- Criminal
Justice
In Progress

Certifications

Oracle Database 10g: Introduction to SQL, Apr 2008

Oracle University Certificate of Completion

Elizabeth Obringer

Business Analyst

Professional Experience

Vision Government Solutions, Hudson, MA Business Analyst

October 2020 - Present

- Data analysis and mapping for new CAMA databases and interfaces
- Immersion and communication of unique client business processes
- Conduct internal and external project review sessions
- Database testing for new CAMA projects
- Analytical support for the Project team
- Collaboration on continuous improvement initiatives

Senior Data Engineer

2015 - September 2020

- SME and product liaison for appraisal, engineering, BAs, QA, support, product, and other VGSI teams
- Point of contact for escalated support requests
- Support all phases of software application projects, including database conversion, defect removal, issue resolution, etc. to ensure a successful deployment
- A primary point of contact for escalated support requests
- Development and alteration of SQL queries for internal and external stakeholders

Software QA Analyst

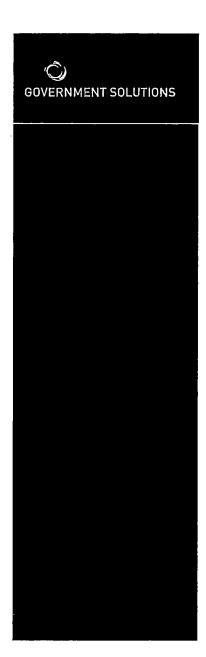
2015

- Design, creation, execution, and maintenance of manual and automated test cases for Vision products
- Interpret system requirements provided for new and existing applications and enhancements
- Validate product documentation accuracy
- Support all phases of software application projects, including database conversion, defect removal, issue resolution, etc. to ensure a successful deployment

Data Conversion Specialist

2014 - 2015

- Design development, testing, documentation, implementation, and maintenance of all software modules and components
- Execute all phases of implementation projects, including database conversions, custom report generation, data validation, and application testing



Elizabeth Obringer

Business Analyst

Software Support Specialist III/SME

2013 - 2014

- UAT and functional level testing of development changes, product builds, and data conversion efforts
- Lead training sessions for internal and external clients
- Research and resolution of reported issues in the Vision product suite
- Development and alteration of SQL queries for internal and external stakeholders
- Perform issue documentation and escalation as needed

Customer Support Manager

2012 - 2013

- Support Team oversight and mentorship
- Oracle Client and Server installations
- Software issue research and resolution for internal and external clients

Senior Customer Support Specialist

2011 - 2012

• Efficient resolution of varying internal and external client requests

SENIOR SYSTEMS INC, MARLBOROUGH MA

Senior Product Support Specialist

2011

Product Support Specialist

2009 - 2011

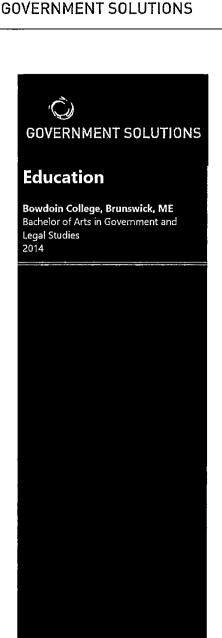
Vision Government Solutions, Hudson, MA

Customer Support Specialist

2004 - 2009

- Deliver effective product training sessions to municipal assessing clients
- Software issue research and resolution for internal and external clients





Scott Mahoney

Director of Operations

Professional Experience

Vision Government Solutions, Hudson, MA **Senior Director of Operations**

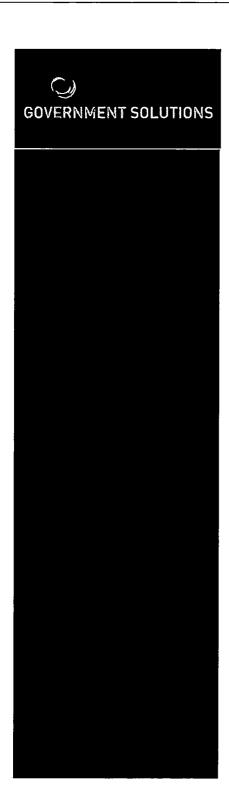
November 2020 - Present

- Lead Customer Support organization, resolving 75+% of requests same-day, and live-answering 98% of phone calls.
- Lead Data Engineering team delivering 100% on-time for database conversion work associated with implementations and upgrades.
- Led migration of support emails to salesforce, creating visibility into support interactions company-wide, and streamlining team efficiency.
- Introduced process to track new KPIs, including first response time, resolution time, and CSAT.
- Determine annual tax printing revenue projection and oversee schedule to ensure monthly revenue goals are met.
- Establish processes and documentation to facilitate transfer of work between Customer Support and other departments.

SS&C Eze, Boston, MA

Associate Director, Client Solutions August 2018 - November 2019

- · Helped lead team of 50 client service analysts, focusing on day-to-day production support of Eze product suite for global investment management firms. Established team processes, analyzed Salesforce data to streamline team efficiency, and served as internal escalation point for team members.
- Managed 7+ direct reports, focusing on coaching and development in dayto-day work, as well as long-term career goals. Held regular 1:1 meetings to track progress against goals and to deliver both positive and constructive
- Maintained relationships with high-revenue and strategic clients, via on-site visits and weekly remote meetings. Led focused-effort across client service teams to stabilize relationships with top clients who were considered at-risk.
- Collaborated with management across client service teams to optimize organizational output and efficiency. Identified inefficiencies in collaboration across service teams, and drove initiatives to address these issues including developing case and handoff templates, and identifying knowledge gaps and developing training.
- Worked with other Client Solutions managers to establish and execute both short and long-term vision for the support organization. Analyzed employee retention, operational budget, promotion and merit projections, trends in volume of work, and other factors in order to maintain a successful team.
- Ran extensive training with new team members, focusing on Eze suite product knowledge, effective phone and email communication skills, data and case management within Salesforce, and the financial industry landscape including asset class coverage and advanced trading strategies.



Scott Mahoney

Director of Operations

- Worked directly with Product Management and Development teams to drive improvement to design of Eze products. Served as client advocate in suggesting new functionality, considering long-term scalable solutions to be leveraged across the Eze client base.
- Helped build and maintain a collaborative, accountable, positive, and inclusive team culture, which was recognized internally via employee engagement and management feedback surveys.

Senior Analyst, Client Solutions

April 2018 - August 2018

- Acted as escalation resource for Solutions Analysts, assisting with complex or urgent incidents and client requests. Ran point on client or third-party outages, driving solutions to minimize impact to clients and owning internal and external communication.
- Ran trend analysis and monitored support work for at-risk clients, partnering with Client Success team to identify opportunities to stabilize the client relationship. Ran with communication on open items for at-risk or high revenue clients, including on-site visits.
- Led team wide initiatives, including establishing processes when product development or industry changes impacted the team.

Analyst, Client Solutions

April 2016 - August 2018

Served as point of contact for Eze clients for real-time issues related to the Eze Order Management System and Portfolio Management & Accounting products. Resolved urgent issues in all areas of the product, including regulatory compliance, electronic trading workflows, end of day allocation processing, portfolio modeling and real time profit & loss, and API workflows. Owned troubleshooting multiple client incidents at once, while maintaining proactive client and third-party communication, requiring a strong ability to multitask, prioritize, and set and manage expectations in highly urgent scenarios.

Associate Analyst, Client Solutions

- Provided tier 2 support to client-facing consulting teams and third-party brokerage firms, resolving real-time incidents related to FIX connectivity and order flow, trade and allocation files, and short locate connections.
- Configured interfaces between clients and third parties. Worked as resource during implementations and new fund launches.





Summary

Data Engineering Lead with experience migrating and transforming datasets from P/L SQL and T-SQL with a proficiency in tuning queries to improve speed and efficiency. Currently the Data Engineering Manager, improving processes and timelines to provide better customer satisfaction and push the boundaries of Data Engineering within the company.

Education

University of Massachusetts Amherst Bachelor of Science in Computational Mathematics Minor in Computer Science Fall 2017

Corey Clark

Data Engineer

Professional Experience

Vision Government Solutions, Hudson, MA

Data Engineering Manager

September 2019 - Present

- Increase speed and efficiency of migration process from P/L SQL legacy software to TSOL by 100%
- Increase on time delivery of customer facing items such as providing data fixes, database tuning by 30%
- Improved migration process for other T-SQL databases to meet front-end requirements by 100%
- Create standard procedures and processes to provide third-party vendors client data using customized views or front-end extracts
- Create dynamic import processes using scripts to automate the consumption of data from third-party vendors to automatically update T-SQL datasets on a regular basis

Junior Data Engineer

June 2018 - September 2019

- Migrate Oracle P/L SQL to T-SQL database to upgrade existing clients from legacy software to new software
- Assist the development team in increasing time of necessary reports by tuning stored procedures, increasing speed by at least 150%
- Create migration process for other T-SQL databases to meet front-end requirements of latest proprietary software using dynamic SQL

Customer Support Specialist

October 2017 - June 2018

- Install proprietary software and database technologies using Oracle P/L SOL
- Create front-end reports for clients using a P/L SQL tool to create SQL views
- Managed several customers' databases internally
- Load and maintain Oracle P/L SQL databases to assist with migration to T-SQL database

CHFA IT - UMASS Amherst, MA

Information Technology Technician

September 2014 - May 2017

- Information technology technician help desk associate
- Printer and PC troubleshooting for faculty
- Self-managing appointments; set up and follow ups; logging information
- · Setup, distribution and maintenance of PC for faculty and staff
- · PC/MAC hardware and software installation and repair



Emily Teagle

Business Analyst Associate

Professional Experience

Vision Government Solutions, Hudson, MA Business Analyst Associate

Isiness Analyst Associate

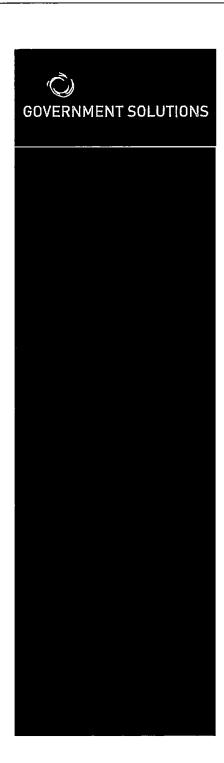
Responsible for data mapping, data mining, and data analysis while also building out custom valuation processes. Sample duties include:

- Efficiently and effectively perform analytics and testing for multiple simultaneous software implementation projects
- Craft custom data mapping & valuation models for assigned new CAMA implementations in New England and national markets, including clientspecific data mapping, table configuration, cost modeling, statistical analysis, and advanced valuation consulting services
- Draft specifications for unique project components, including imports, exports, and custom reports
- · Conduct beta conversion validation and client-facing review sessions
- Synchronize project team members with customer expectations for optimal client deliveries
- Consulting with the Product team to define critical Vision CAMA product enhancements and gaps for new state entry
- Create custom client analytical dashboards
- Employ agile methodologies to achieve industry-leading project delivery schedules while maintaining ongoing customer engagement and excitement

King William County, King William, VA Senior Fiscal Specialist

February 2019 – August 2021

- Responsible for processing debt service payments for both the County and County Public Schools; prepared adjustment entries for debt service; ensured timely payment of P&I for County and School Division loan payments
- Processed state and local sales tax to the schools and tracked transfers to ensure compliance with appropriated budget
- Tracked and charged out billings for insurance premiums, fixed charges, and information technology services
- Prepared and processed monthly, quarterly, and year-end tax, financial, and operating reports or payments as required
- Assisted and provided detailed financial information to the auditors and Director of Financial Services
- Assisted the Director of Financial Services and County Administrator with the budget development process
- Monitored and engaged in day-to-day activities for accounts receivable, payroll, and accounts payable
- Prepared and analyzed accounting financial reports and reviews for accuracy
- Drafted financial documents, such as budgets and State reports



Emily Teagle

Business Analyst Associate

- Participated in audits and played an integral part in developing the Comprehensive Annual Financial Report (CAFR)
- Prepared, entered, and posted adjusting entries to the ledger under GAAP requirements
- Coordinated with the County Administrator and Finance Director to develop and monitor project scope, schedules, and budgets
- Served as the project manager for appraisal and ERP software implementations
- Served as the project manager for high-level County projects for multiple departments
- Coordinated procurement for special projects, including writing RFPs/IFBs, evaluating bids, coordinating meetings with vendors, awarding projects to the bidder
- Worked closely with Finance Department concerning budget and finance activities related to special projects (i.e., purchase orders, invoices, credit checks, payments, etc.)
- Provided County Administrator and Finance Director reports from the AIS system as needed
- Maintained records on all special projects as part of records retention and FOIA

King William County, King William, VA

Deputy Commissioner of Revenue January 2017 – February 2019

Administered state and local laws to assess various property types (personal property, business personal property, real estate, and business licenses); maintained personal property and real estate records; researched and updated maps and land parcel information; reviewed and processed state income tax returns and estimated payments.

King and Queen County, King and Queen Courthouse, VA Deputy Commissioner of Revenue September 2015 – March 2016

Reviewed real estate and personal property records; maintained the assessment of various taxes; processed DMV downloads; assisted with Elderly/Disabled/Veteran Credit applications and processing

King William County, King William, VA Land Use Technician

September 2015 – March 2016

Assisted with land use ordinance and applying for land use; utilized Legasuite and Bright systems to research land parcel information and enter land use information; reviewed and validated qualifying parcels.

Vision Organizational Chart

The Vision team currently includes more than 300 employees, distributed across 5 core teams:

Appraisal Services

Customer Operations (Data Engineering and Customer Support)

Sales, Marketing, and Implementation

Product Development and Engineering

Finance and Human Resources

Vision has intentionally built our organizational structure to ensure incentive alignment with our new customers.

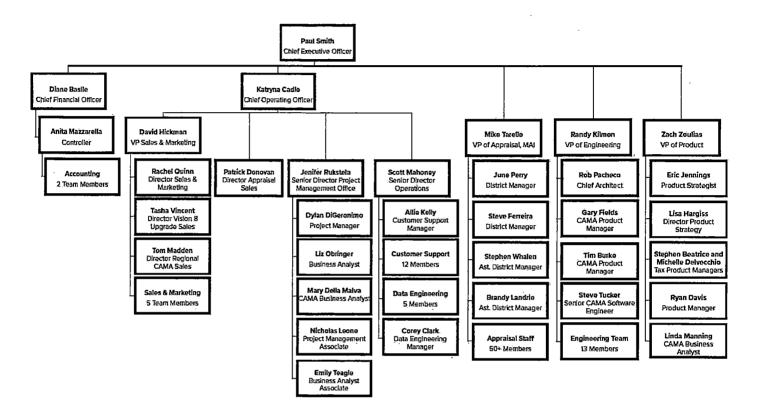
A few highlights:

- Sales and Implementation are part of the same team. This means that the Sales team commits to only what we can successfully deliver, and the Implementation team is fully involved in the sales process from start-to-finish.
- The Customer Operations team includes Levels 1, 2, and 3 support, to ensure that any question can be answered on demand, no matter the complexity level. This team is staffed with Data Engineers, technical experts, and subject matter specialists.
- The Appraisal Services team comprises more than 170 team members. This enables Vision to provide unique valuation expertise and appraisal guidance throughout the software implementation project (and thereafter in future reassessments).
- Strong and integrated Product and Engineering organization, which delivers up to 20 dot releases per year as well as continuous product feature enhancements.

Document 1-2



Organizational Chart





V. Implementation Approach and Capacity

Vision is committed to developing and nurturing a long-term partnership with the City of Norfolk. In that spirit, we have developed a Vision CAMA package that is designed to provide all the services required for a successful implementation, from kick-off to go-live and beyond.

"Our conversion to Vision 8 went very smoothly. We've had fantastic support from our Project Manager Jen Rukstela, and the communication process with the Vision team throughout the project was great. Our on-site training with Matt Burke was outstanding. New technology can be challenging at first, but he was very knowledgeable about the product and was able to spend a lot of time with our staff showing them how to move forward with the new platform. Vision has been great about holding our hand and guiding us through this process and we're excited to be part of the Vision community!"

Rod Compton, CAE Real Estate Assessor Prince George County, VA

This package is built to embody the principles of:

- 1. A partnership approach to collaboration
- 2. Fast implementations with clear delivery milestones
- 3. Accountability through aligned incentives, clear commitments, and user-interface-based configuration
- 4. A commitment to long-term success with a long-term transition and customer support plan

To accomplish those principles, the Vision CAMA package comes with all the services required to make an implementation successful. This begins with implementation and onboarding, but 90% of the true value comes from the decades-long ongoing support relationship.

Below, we describe the speed, reliability, and standardization of our implementation services, followed by the long-term support services that we will provide to the City.



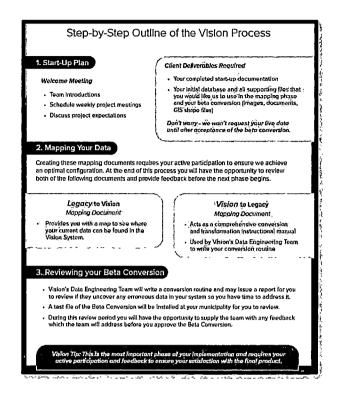
Vision 8 Implementation Services Highlights

This implementation will follow the Vision 9-month implementation program. This program consists of key milestones to ensure an efficient and smooth transition for the City of Norfolk.

Based on the success of our most recent implementations, we are confident that we can achieve this schedule so long as the City commits to returning its review and deliverables within the timeframes specified in the implementation plan. The key milestones and associated services within the proposed implementation include:

Successful Project Kick-Off and Project Start-Up

- During this phase, Vision assigns a dedicated Project Manager to guide the
 implementation and the City of Norfolk will assign a liaison to work
 collaboratively with the Vision Project Manager throughout the implementation.
 Vision recommends the assignment of a liaison from the City Assessment
 Leadership team as well as a technical liaison from the Information Technology
 team.
- Vision will provide detailed questionnaires for documenting the City of Norfolk's data mapping needs and will request a copy of the legacy system data for initial review.
- Vision will provide project overview documentation identifying the responsibilities of both parties with clear milestones, tips & tricks, and common sticking points for implementations
- During this phase, the City of Norfolk is responsible for providing legacy system data and documentation to enable data mapping to proceed quickly



Sample Kick-Off Implementation Document

Regular Communication to Ensure Ongoing Collaboration

Continuous and collaborative communication is the key to a successful implementation. Each municipality knows its data and data entry conventions better than any vendor. That's why it's important for the City of Norfolk to collaborate closely with the Vision Project Manager throughout the process to provide guidance on the conventions unique to your community.

Most downstream data issues result from matters of interpretation, not the technicalities of data transfer. Examples include:

- How do you intend this field to calculate?
- Why do you use this field that way instead of this other field?
- Why do you store naming conventions that way?

While this collaborative problem-solving approach requires more investment from both parties, it ultimately enables us to co-create a strong database foundation up front, which reduces data cleaning work or workarounds after the implementation.

To guide this communication process, every Vision CAMA implementation includes a dedicated Project Manager whose responsibility is to ensure implementation success, liaise with the Community, and provide feedback and recommendations for a successful outcome. Our Project

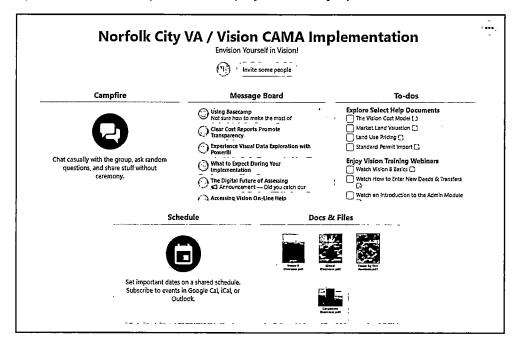


Managers have an average of 10 years in the appraisal industry. This ensures that every Project Manager is deeply versed in the language of valuation to ensure optimal data mapping outcomes, and also provides a high-touch level of service that is unique to the CAMA industry. The Vision CAMA package includes Project Management services for the entire duration of the project.

Document 1-2

Vision will also set up weekly check-in calls during the project implementation phase. These check-in calls are designed to gather feedback, ask collaborative questions, discuss complex data issues, and provide checkpoints for key project milestones.

To facilitate the real-time communication process, Vision will provide access to an online Project Management communication hub, Basecamp, at no additional cost. Basecamp is accessible via the web or your mobile phone and serves as a platform for continuous updates, real-time communication, project documentation, milestone management, and more. We have found that using this platform reduces implementation project times by upwards of 20%.



Example Basecamp Project Management Site

Data Mapping to Ensure Smooth Transfer of Information Before Conversion

Once Vision receives the legacy data, we enter the data mapping phase. During this phase, Vision works in close collaboration with the City of Norfolk to translate the language of the legacy system to the language of Vision.

This process oftentimes enables us to highlight data outliers or "dirty data" that can be cleaned up during the conversion process. Some examples are a bad date (2/31/2017), 15 bathrooms in a 1200 SF home, and "W" in the number of bedroom field. The benefit of this collaborative period is that you can often end up with better data coming out of the conversion than going in!

This mapping period is the special magic of the Vision conversion process and accounts for the high level of satisfaction of recent Vision implementation customers.

• Reliable, Accurate Data Conversion Services (and Built-In Review Periods)

Once the legacy database mapping is signed off on by both parties, Vision will enter the data conversion period.

Specifically, Vision will perform three conversions: a beta conversion, a revised beta conversion, and a production conversion:

1. A Detailed Initial Beta Conversion and Review Period: After initial data mapping is complete, Vision will install the Vision CAMA software with your first beta database conversion. Not to worry – you won't be left to fend for yourself; your Vision Project Manager will be with you the entire way! Specifically, Vision will provide a custom "guide to your beta review" document and will complete initial training specially designed to get you up to speed with your beta review.

For instance, we'll share specific tips for review, such as reviewing your largest or most complex properties, searching based on different criteria, etc. During this review period, your community will not be down from the legacy system. This period is designed to provide a worry-free sandbox environment for learning the *Vision CAMA* software and ensuring that your Vision Project Manager successfully interpreted your guidance during the data mapping process.

Using this multiple Beta Review process and leveraging the actual *Vision CAMA* platform for review process has significantly reduced the new software learning curve, improved data accuracy throughout the conversion process, and increased customer satisfaction following go live.

- 2. Beta Revisions and Revised Beta Conversion: The best way to understand the outcome of decisions made during data mapping is hands on review. Only then can you truly make final decisions on how best to convert your data and configure your database. During this phase, we integrate all requested modifications that stem from the Beta Review period.
- 3. **Final Production Conversion:** By this time, you and your team will be very comfortable with the Vision CAMA software. Once you have approved the revised beta edits to the

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database conversion, Vision will complete a final "production" conversion with the live legacy data. A final conversion with the live legacy data, using the scripts from the beta conversion to dramatically reduce downtime. You'll then be officially "live" and training and configuration will commence.

Each data conversion pass is completed by our Data Engineering team in close collaboration with your Vision Project Manager. Your community will receive a dedicated Data Engineer to ensure familiarity with your database throughout the project. However, it is also important to note that Vision maintains a full team of Data Engineers to provide back-up and contingencyplanning support.

The conversion services provided in the Vision CAMA package assume that we will convert from a single legacy system with electronic data. We will convert property characteristics data and sketches for the entire production database, with unlimited years of ownership and assessment history as available in the production database. We do recommend that municipalities keep the legacy system running to access historical years in parallel with Vision CAMA, and we can offer conversion services for additional historical databases (i.e., with full tables and sketches) for an additional cost.

In addition, every Vision conversion includes electronic conversion of the sketch data, if available. In order to convert existing sketch data into the Vision CAMA native sketch application, customers must provide sketch data in a non-proprietary electronic "traverse" format, which shows 'pen movements' for each shape and links each shape to its associated sketch label. It is uncommon, but some sketch vendors do charge for an extract of the sketch data.

Integration, Configuration, and Personalization Services

As part of the implementation, Vision will provide integration and configuration services designed to provide a seamless roll-out personalized to the City.

Configuration Services Summary:

- Vision will provide a recommended default configuration for Vision CAMA. This gives us a starting point for personalization.
- Vision will hold a detailed software configuration workshop, which will cover:
 - 1. Property Record Card template formatting
 - 2. Taxpayer website configuration



- 3. Configuring GIS with your community's unique shapefiles
- 4. Tooltip and field naming validation
- 5. Set up of usernames, user groups, and associated user permissions
- 6. Screen layout, sequencing, and visibility
- 7. Field layout, sequencing, and visibility on each screen
- 8. The setting of field parameters for data entry
- 9. Preferences for table maintenance, cost modeling, and comparable sales
- 10. Review of all software features that can be enabled/disabled in the Administrative Module

Integration Services Summary:

Vision CAMA can integrate with many third-party platforms in common use by Assessing Departments, including importing zoning information, transfer data, and building permits as well as exporting information to the Tax system.

For instance, Vision CAMA is installed in over 430 communities, and every one of them has a Tax software platform. These communities are as complex as New York City and Washington, D.C. Deep integration with the Tax software is required to ensure the seamless calculation, dissemination, and collection of tax bills.

Vision's Project Manager will guide the County through a questionnaire designed to inventory the business rules that will be used to integrate with the municipality's Tax system. Then, our technical staff work directly with your Tax department and vendor to create and schedule a custom and automated import and extract to ensure seamless flow of information that aligns with your database language.

Foundation for Valuation:

Any vendor can convert values on override. Instead, we pride ourselves on setting up a strong foundation for valuation during every Vision 8 implementation. This ensures that values are table-driven and that cost models are developed and calculating, including the building of initial cost models, the set-up of land and depreciation tables, etc. Vision will collaborate with the City through valuation workshops to ensure that the desired rates and adjustments are in place while promoting a deep understanding of the Vision 8 valuation engine.

The Vision Project Management team has deep appraisal expertise, supported by our team of over 50 Appraisal Personnel. This level of expertise ensures that communities are working with a true valuation thought partner, and it sets the City of Norfolk up for valuation success with a long-term foundation for table-driven values.

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Installation and Go-Live

The *Vision CAMA* package includes hands-on installation of the software, with two deployment options:

- 1. Option 1: Cloud Hosting Deployment: For communities opting for a cloud-based deployment, Vision will install the software on our servers and provide access credentials. Vision works with a professionalized data center to store all of our cloud data. This data center is a full-service, 40,000 square-foot facility with video surveillance, photo ID card access system, 24x7x365 onsite personnel, and iris scanners. It is backed up by three unique power sources and 14.25MW of generator back-up power and has raised floor design supports to reduce flooding and damage risk. It includes nightly back-ups and passes the tightest security compliance measures in the country (SSAE 16, SOCI and SOC2 Type II compliance). Additional security information is available upon request.
- 2. Option 2: On-Premise Deployment: For communities opting for on-premise deployment, Vision will provide full installation services. This includes installation of the database on your servers as well as the client application on your Desktop PC's, using TeamViewer or a similar approved platform. If your IT team prefers, Vision can also provide instructions for your IT team to complete the installation without Vision's involvement.

Vision will share technical specifications and requirements at the beginning of the project and will work directly with your IT team to ensure that all server permissions are configured to enable the seamless functioning of all relevant reporting services and integrations. Vision will also test the functioning of the tax integration, GIS module, and taxpayer website to ensure that all install requirements have been completed successfully.

In the final steps of the go-live process, the City will send the complete legacy data for final conversion. Vision will convert and test the data before installing the live file. This process will take, on average, two weeks. This is followed by a configuration call, your scheduled training, and final transition meetings, lasting on average 1 month. During this process, the City is encouraged not to make any data changes for the two weeks during the final conversion. This is to ensure the most up-to-date data is converted and no double-data entry is required.

Finally, if the City of Norfolk opts for using the Vision Taxpayer Web Hosting Service, then Vision will set up a website dedicated to displaying property value and ownership information to taxpayers. This site is further described in the Product section of this proposal. The Vision Taxpayer Website includes an automated web loader to schedule data updates at the frequency of your choosing to ensure that all information is properly up to date.

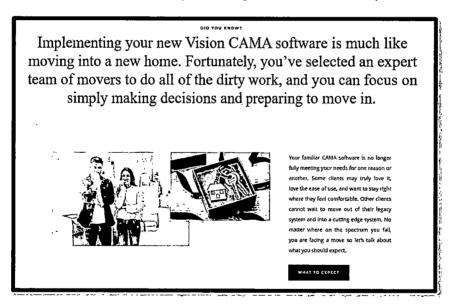
A detailed and comprehensive onboarding & training program for the City.

Vision is deeply committed to long-term Customer Success. To that end, we provide go-live training upon install, a bank of "refresher" training days for use at your convenience, as well as free monthly training webinars and annual User Groups to enable continued learning.

Further information about our training and long-term support plan are enclosed in their respective sections in this proposal.

For additional information about the Vision Project team and new CAMA implementation project plan, visit the Vision Blog at https://www.vgsi.com/2021/01/28/moving-into-visioncama-is-like-moving-to-a-new-home/

> Jen Rukstela, Senior Director - Project Management Office (PMO) shares details about what to expect during the Vision CAMA implementation



Vision Blog: Implementation Project Plan

Cloud Hosting and On-Premise Deployment Options

Two Options for Software Deployment

Vision provides two options for software deployment: an on-premise approach or an optional Cloud Hosting service.

For every new customer, Vision offers complimentary cloud hosting services for the duration of the implementation. This approach enables both parties to exchange information quickly during the beta review process, without having to worry about getting the right hardware in place.

After "go-live," the community can either deploy Vision CAMA on their own servers or on the Vision Cloud. Communities opting for on-premise deployment should review the Vision CAMA Hardware Specifications enclosed in this proposal. In this approach, communities will need to provide their own SQL server and SQL licenses.

Approximately 60% of Vision CAMA customers opt for the Cloud Hosting approach. In this approach, Vision will install the software on our servers and provide access credentials. The community will not need to provide their own SQL server or SQL licenses. The community will still need to provide internet access and Desktop PC's, on which Vision will install the local client for access to the cloud.

To aid the evaluation, we have included cloud hosting pricing as an optional service in the pricing section of this Proposal.

Benefits of the Cloud Approach

- **Cost Savings:** The average cloud-hosted community saves \$10k or more by moving to the cloud, removing the need to purchase a server, server licenses, and pay for costly server maintenance
- Quick Software Releases: Cloud-hosted communities receive lightning-speed feature releases, meaning your community gets access to Vision's latest feature & functionality improvements instantaneously without having to schedule a code update
- Receive Immediate Support: Cloud hosting enables our Customer Support team to instantly access and troubleshoot your database instance, any time, with no delay
- **Protect Your Data:** With fully redundant infrastructure and strong security, your critical property data will be fully protected. Not to mention, we include free nightly back-ups.

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The Vision Cloud Data Center

Vision works with a professionalized data center to store all of our cloud data. This data center is a full-service, 40,000 square-foot facility with video surveillance, photo ID card access system, 24x7x365 onsite personnel, and iris scanners. It is backed up by three unique power sources and 14.25MW of generator back-up power and has raised floor design supports to reduce flooding and damage risk. It includes nightly back-ups and passes the tightest security compliance measures in the country (SSAE 16, SOCI and SOC2 Type II compliance). Additional security information is available upon request.

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Vision requests that Customer provide Internet circuit capable of 1.5 Megabits upload and download, with a static public SNAT IP or a range for whitelists on our firewall, on ports 80,443,5000, including our hosted CAMA server URL and Reporting Server URL. We also ask that your local antivirus exclude the CAMA installation folder and all of its contents.

VI. System Capabilities

Technical Requirements – Attachment I

Please find the technical requirements on the following page.

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		.=	Available Custom	 3rd Party	Not Available	Notes
ļD	REQUIREMENTS APPEALS				ਰਾਜਦਾਰਾਦਾ ਜਾਜਦਾਰ ਹੈ। - ਪ	
1	The solution can assign an auto-generated appeal ID number as well as provide a field for a user-defined ID number.	Yes				The Appeal ID can be manually entered into the application or imported in via a custom import. A user-defined field is available for a user-defined ID.
2	The solution can allow for development of customized appraisal reports in response to an appeal.	Yes				
3	The solution can create an appeals workflow to assign various progress points to each appeal. Progress examples include initial call needed, informal appeal filed, formal appeal filed, site visit, more research needed, hearing ready, etc. The solution should send automatic reminders to appraisers of unfinished workflow items.	Yes				Vision Reports enable supervisors to identify parcel assignments and workload, but the system does not currently support reminders.
4	The solution can store, display, and print all forms, letters, comparable sale grids and any other documentation sent to a property owner or presented during the appeal. This may be accomplished through an interface with a City imaging system and associated with the correct parcel identifier. Letters and forms should be customizable if generated by the solution.	Yes				Vision provides robust reporting capability, including pre-built reports for appeals support, comparable sales sheets, and mail merge for letters and forms.
5	The solution can automatically populate the appeals and history records with information from the related accounts.	Yes				Yes, Vision populates and stores Appeal History to the related Appealed Account.





6	The solution can enable users to view comparable sale properties by user- selected parameters and comparably assessed properties alone or with an option of simultaneous viewing the subject property and three or more comparables. For appeals other than Board of Review, the solution has the ability to track multi-year appeals that need to remain active until completed. Each year identified in the appeal must be linked to the values for that year.	Yes	
8	The solution can generate stipulation agreements, hearing notices and final orders, tracking the date printed and date mailed. The solution includes a Board of Review appeal tracking	Yes	The Vision Report Writer includes a robust Mail Merge tool enabling the creation of notices, forms, and orders. Mail merged notices can be associated to the parcel automatically upon merge, within the Associated Documents module.
9	module. This module is interfaced with the Assessor's application.	Yes	
10	The solution allows parcel identifiers to be entered for assessment and sales comparables. It should auto populate and summarize the related improvement square footages and other data and export that data and imagery into a uniformly designed PowerPoint presentation for use at Appeals hearings.	Yes	The solution allows for user-defined Cost Modeling and Comparable Sales Models. These models can include any parcel identifier for assessment purposes and/or be included in the comparable model. The user has the ability to print cost ladder sheets to display the cost model calculation for each building/section on a parcel. The system can generate comparable sales cards. These cards display the attributes, adjustments, and photos of comparable properties. The comparable sales cards can also be printed. Vision reports can be exported into multiple formats for insertion into a Pre-Defined Power Point Presentation, including into GIS for mapping to create

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	·				
					spatial visualizations. Vision CAMA does not generate Power Point Presentations.
	The solution contains a tool that will allow the				
	scheduling of hearing dates and times. The number of				
	appeals per time slot is user-defined. The solution is able				
	to generate a hearing docket and provide notices of				
11	hearing dates for appraisers and property owners.	Yes			
	The solution can allow for manual entry of hearing dates				·
12	and times.	Yes	 	,	
	For appeals other than BOR, the solution contains a tool				
	that will allow for manual entry of hearing dates and				
13	times.	Yes	 		
	The solution has the ability to allow a call-in informal				
1.4	appeal to be entered, routed and tracked to the	V			
14	appraiser to return the call.	Yes			
	The solution has the ability to track certified tax history				
15	values, petitioner requested values, appraiser recommended values and Board ordered values.	Yes			
13	The solution provides fields that allow users to record	163	 		
	and track the owner's response to letters referenced				
	above. (e.g. Yes, No, Agree, Disagree, Continue to				
16	Board of Review, etc)	Yes			
	The solution can give users access to all values and		 		
	allows the user to determine which values are used to				
17	populate standard forms and letters.	Yes			
	APPRAISAL		 		
	The solution can enable user to apply multiple				
	adjustments for the physical, functional, and economic				
	obsolescence; location and market influence adjustments				,
	for factors that affect property values. Additionally,				
18	each adjustment can be identified with an explanation	Yes			





Γ	code. Each adjustment can be associated with a sunset		
	date.		
	The systems allows for appraisal activities within market		
	areas (neighborhoods), submarkets (a collection of neighborhoods) census tract, or other user-defined	i I	
	areas. "Appraisal activities" may be defined is all		
	activities (sales abalysis, mass calculations, etc.) available		
19	within the solution.	Yes	
	The solution can identify different value components		
	(e.g. market value, assessed value, land use value) and		
20	annually adjust each component separately.	Yes	
	Must be able to store all Rate tables, adjustment &	ļ	
	influences used to value property separately for each assessment year. Be able to use those stored data items		
21	for value corrections for the appropriate year.	Yes	
	The solution can allow multiple building condition		
22	descriptions (E.g. Fair, Good, Average etc.)	Yes	
23	The solution provides the ability to assess leasehold boathouses, mobile homes, airplane hangers, decks, carports, leased buildings, etc. under their own property account numbers, independent from the land on which these improvements might be located.	Yes	Vision has multiple ways to approach this. As one example, the City could create a parcel for leasehold boathouses, mobile homes, airplane hangars, decks, carports, leased buildings, etc. under their own property account numbers, independent from the land on which these improvements are located or create Personal Property Account for each leasehold boathouses, mobile homes, airplane hangars, decks, carports, leased buildings.
	The solution allows for additional classes beyond the		Vision supports the Marshall & Swift
	base building quality classes established by standards		commercial valuation black box engine for
24	such as Marshall & Swift.	Yes	commercial properties.
	The solution derives building square footage from the		
25	sketch or may be entered manually.	Yes	





26	The solution allows user-defined building styles as well as the base styles defined in standards such as Marshall & Swift.	Yes	
27	The solution should provide a comparable sales approach that displays individual property characteristics for subject and comparable property, and auto-calculates individual and gross comparable property adjustments. The solution allows for export of comparable sales grid in report format (paper and digital).	Yes	
28	The solution can identify and value contiguous land with the same owner, allowing valuation as one parcel or economic unit.	Yes	Via Associated Parcels
29	The solution provides a display of all calculation details that contribute to the built up cost value for residential and commercial structures, out buildings, yard items and improvement features.	Yes	Vision's Cost Ladder Report will display the calculation details that contribute to the built-up cost value for residential and commercial structures. Vision's Land Report will display the calculation details for the contribute the cost for the land values. Outbuilding and Extra Feature calculations are displayed on the corresponding screens.
30	The solution provides cost rates as well as depreciation tables for "single-wide", "double-wide" and "triple-wide" mobile homes. The depreciation tables for mobile homes should be independent of other improvement depreciation tables.	Yes	
31	The solution provides cost tables/rates from Marshall & Swift or another nationally recognized third-party source with annual cost updates as a fully integrated tool.	Yes	Marshall & Swift is available for commercial parcels. Vision will also support Value Calibration during the conversion process to ensure the Vision cost tables are set up and valuing upon install.





	The solution can calculate a replacement cost new (RCN)			1		
	and replacement cost new less depreciation (RCNLD) for					
32	all improvements/structures.	Yes				
	Can import & store cost for all property types,					
	structures, yard items, special use, & outbuildings data				,	
	from external sources (such as Marshall & Swift cost	,			,	
33	handbook)	Yes			,	For commercial parcels
1	The solution uses similar descriptive language as the cost					
34	handbook source.	Yes				
1	The solution can allow for adjustments or modifiers,	1			}	The solution allows for adjustments or
	either globally, or for each geographic area (cycle,					modifiers, either globally, or for each
	neighborhood, city, etc.) or property type, with user-					geographic area (cycle, neighborhood, city,
	defined defaults and rules. The solution can allow for					etc.) or property type. The solution also allows
75	user-defined annual adjustments through an automated	Vac				for user-defined annual adjustments, however this is a manual process.
35	process.	Yes	_			this is a manual process.
	The solution can enable users to apply different		•			
36	depreciation amounts to different buildings on the same property and allow user override.	Yes				
30	The solution can allow the user to indicate when	163		 		
37	property characteristics are estimated.	Yes				
31		163		<u> </u>		
	On each land record, the solution can store and calculate					
	adjustment factors to be applied by percentage or by lump sum (such as corner, pad site, prime land,					
38	contaminated etc.).	Yes				
130	Contaminated etc.).	103				Vision stores Assessed Value calculations and
		!				values for parcels as far back as you have full
	The solution can store land book calculations and values					database conversions into Vision CAMA.
	for at least the current year and five years back.			1		Vision CAMA does not extend Assessed Value
	lor at least the current your and nive years buck.					to Tax Calculations. These are handled in the
39		Yes				Tax system.
	<u> </u>	1.03			1	Tun ojotanii

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40	The solution can separate the land component of a single parcel into specific land segments (homesite, low, wet, rolling, flat, etc.), each with its own value component.	Yes				
41	On each land record, the solution allows multiple sub- category identifiers per parcel, such as corner, pad site, prime land, contaminated, etc. Identifiers can then be linked to a value table, coefficient, or percentage adjustment.	Yes				
42	The solution can accommodate different units of measure for land value, including, square foot, front foot, acre, and number of homesites and has separate fields for each unit of measurement.	Yes				·
43	The solution can Incorporate the development of land valuation models by all tracked land characteristic fields including but not limited to zoning, property type, location, and unit of comparison.	Yes				
44	The solution provides an automated approach to valuing land utilizing rate tables that can be set up on an acreage, square foot, front foot, or site value basis either for a batch process for multiple accounts or for a single parcel.	Yes				
45	The solution can allow for the calculation of land values based on present use and using table-driven land values.	Yes				
46	The solution can track land by topography categories (low, flat, steep, wet etc.) with the ability to apply an adjustment factor specific to each topography category per parcel.	Yes				
47	The solution can allow percentage adjustments to base land value tables to reflect influences that may not be typical in the neighborhood (development issues, access)	Yes				





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48	The solution can allow percentage adjustments to land values on parcel-by-parcel, line-by-line basis to reflect influences that may not be typical in the neighborhood (development issues, access).	Yes		
	The solution allows for calibration of cost to local market	-		
	using modifiers based on style, location, area, and other			
49	property/land characteristics.	Yes		
50	Ability for a user to selectively mass-change items as a "bulk update," without violating business rules.	Yes		Users (with appropriate credentials) have the ability to "bulk update" and "bulk insert" fields throughout the application. Business Rules that have been violated can be identified on a recalculation error log.
	Able to sync data for selected benchmarks or			
51	neighborhoods only.	Yes		
	The solution can allow adjustments at the improvement,			
52	land, and property levels.	Yes		<u></u>
53	The solution can enable users to move structure information for one or more structures from one parcel to a different parcel. Various value approaches applicable to each moved building follow building to new parcel. Pictures and sketches should follow structure information and values.	Yes		
	The solution can display all records associated with any		-	
	parcel (e.g., land parcels, parcels with two homes,			
	contiguously assessed parcels) and calculate the overall			
	value of all records while maintaining and displaying	V		
54	separate values.	Yes		
	The solution provides for the storage and retrieval of			
55	sketches with multiple sketch parts for multiple structures per property.	Yes		
 	The Solution values improvements, yard items, special	103		
56	use, outbuildings according to percent (%) complete.	Yes		
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57	In each value approach, the solution has field(s) to capture and apply appraiser's calculation of: 1) Functional Obsolescence 2) Economic Obsolescence 3) Physical Obsolescence	Yes	
58	The solution provides for the use of percentage modifiers to calibrate RCN to the local market.	Yes	
59	Supports the ability for an appraiser to designate changes to a parcel for future batch updates, such as new construction that must be posted in future dates. Goal is to minimize trips to the field.	Yes	New Construction Parcels can be flagged as a "Future" parcel. Existing parcels with permits (for future rolls) can be set to "Parcel Value Freeze" for these parcels the value changes will not be applied to the current year value.
60	The solution provides a value reconciliation process between all valuation approaches to derive the final reconciled value estimate.	Yes	
61	The solution has a "default" valuation approach with an appraiser override feature where the user can select an alternate valuation approach in the reconciliation process.	Yes	
62	The solution can support a value reconciliation process within the comparable sales approach and between other valuation approaches to derive final reconciled assessed value estimate.	Yes	
63	The solution can allow users to select either the cost approach, direct comparable sales approach, the income approach, or a combination of the three approaches to value for each property.	Yes	A combination of the three approaches can be utilized when the parcel has more than one building.
64	The solution can store adjusted sales prices represented by time trending; if the sale includes personal property, intangible or business value.	Yes	





65	The solution can allow the user to edit a sketch without the need to re-enter data. For example, the user needs the ability to add an addition to an existing sketch, without the need to redraw the original sketch.	Yes		
66	The solution can batch export sketches (including notes, labeling, and improvement information such as floor, type, etc.) for each sketch part into an Esri native vector format that includes sketch attribute and location information. The location information can be used so that the exported Esri format vector data is both placed and rotated in the correct geographic location with the correct orientation.		Custom	Vision provides professional services for export of sketch vectors; this is not available through the user interface. Vision can include Lat and Lon points for sketch placement if Norfolk has these exact geographic points identified stored and related to the corresponding sketch segment points within the current database. Current Vision Clients are displaying Building Outlines on the GIS section within Vision Web Portal, however the placement of these outlines was typically executed by the local GIS departments.
67	The solution has the ability to import sketch data from multiple sketches or drawing software programs.	Yes		Vision has successfully converted sketches from dozens of legacy CAMA platforms including ProVal. In addition, Vision can convert sketches from third party solutions such as Apex. Vision also has a strong partnership and has developed enhanced integrations with Data Cloud Solutions and seamlessly integrates with the MobileAssessor sketch package.
CO	The solution can allow for sketches of large footprint	, , , , , , , , , , , , , , , , , , ,		
68	and multi-story buildings.	Yes		
69	The solution can allow for the printing of the sketch as a separate page or included on the appraisal summary form.	Yes		





70	The solution provides a method to identify, and catalog disassociated sketches, with the ability to purge. The user is able to copy a sketch from the catalog to a property account.	Yes			Sketches can be saved and imported on to selected parcels in the database. Sketches stored in the Vision application cannot be purged, but can be deleted.
71	The solution has the ability to enter a disassociated sketch for a property prior to segments being created. The solution can allow printing of the sketch for field verification.	Yes			Vision CAMA allows the user to enter sketches for property segments, these sketches create the segments. The solution allows for printing and exporting of sketches. In addition, once the sketch is entered in Vision CAMA it becomes available in the MobileAssessor platform for field review (considering the device is connected).
72	The solution provides a sketch application or integrates with a 3rd-party tool.	Yes			
73	The solution can allow the user to designate which sketch or sketches are used as a building footprint layer.	Yes			
74	The solution can allow view-only access to sketches.	Yes			
75	The solution can allow the user to control the size and locations of dimensions, labels, annotations, and notes. The user is able to easily sketch irregular shapes (radius, circles, angles) for all structures and outbuildings. The user is able to place annotations in various sections of the sketch showing year built and is able to shade specific building areas, specify line widths, shading colors, etc. The user is able to use patterns such as diagonal lines, dots, etc. covering a selected area of the building.	Yes			
	The solution can support multiple building sections and	103		-	
	structures per property with full sketch and/or		1		-
76	identification as to approximate location on property.	Yes			





	The user has the ability to zoom in and out during			
77	sketching, editing and viewing.	Yes		
78	The solution provides full sketch drawing data entry and editing on a portable field device.	Yes		Vision has an extensive partnership with Data Cloud Solutions and has developed enhanced integrations with their Mobile Assessor platform. This requirement will be accomplished via MobileAssessor.
79	Solution can value a building without a sketch based on user-entered total square footage.	Yes		
80	Customer self-service web portal allows unlimited sketches and photos per parcel.	Yes		
81	The solution can enable users to compute standard IAAO statistics for sales ratios; level of assessment, minimum and maximum values, variance, mean, median, standard deviation, coefficient of variation, average absolute deviation, coefficient of dispersion and price-related differential (PRD).	Yes		
82	The solution can allow provisional changes in a test environment to characteristics and underlying tables, with the ability to retain these test versions that can allow for review, editing and applying to the CAMA system.	Yes		
83	The solution is able to integrate with Spatialest AppraisalEst statistical modeling application and transformations of variables.		Custom	We can create a custom import / export to the Spatialest data. This is included in the Optional Services in the price proposal below. The Vision 8 system also includes a Sales Analysis Tool that enables appraisers to calculate the mean/median/COD/PRD/etc. on any stratification of sale property types captured in the System in order to develop/reconcile the tables in use.



VISIONGOVERNMENT SOLUTIONS

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	The solution provides tools to assist in the calibration of			
	cost and depreciation tables to the local market.			
	Calibration tools must include land and building adjustments at a market area and neighborhood area			
84	level.	Yes		
	The solution can enable the user to develop, apply, test,			
	reverse or accept statistical valuation models to subject			
85	records of the same type, same location and with the same units of comparison.	Yes		
	The solution can allow the user to incorporate time	163	 	
86	adjustments into sales and ratio studies.	Yes		
	The solution can generate a standard ratio report by user			
	specified criteria. (User specified criteria such as: sale			
87	date range, sales ratio range, verification codes, property class, neighborhood codes, etc.)	Yes		
01	The solution can calculate and display common units of	res		
	comparison such as Value per Unit, Value per Room,			
88	Price per Square Foot. etc.	Yes	li	
	Supports additive, multiplicative, and hybrid value			
89	model formats.	Yes		
	The solutions allows for overrides of calculated value of			
90	either the total value or individual improvements.	Yes		
91	Separately assign building characteristics and year-built			
-	date for additions (including second story additions).	Yes		
,	COMMERCIAL APPRIASAL		-	1
	The solution allows the reassignment or redesignation of			
92	commercial uses of structures originally designated for residential dwellings and vice versa.	Yes	1	
	residential aweilings alla vice versa.	162		Vision can accept imports from various
	The solution can import and store income & expense			Vision can accept imports from various sources. Pricing for this specific import can be
	data from external sources.			provided during the contracting process or
93		Yes		executed during implementation as a Change





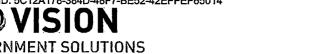
			<u></u>			
						Order when the specific fields and formats are scoped. Many Vision customers are using income & expense data to value commercial properties today.
	The solution can allow the valuation of income-		-			
	producing property using the direct capitalization and					
	gross rent multiplier method or gross income multiplier					·
94	method.	Yes				
	The solution can allow multiple income approaches such					
	as direct capitalization and Gross Rent Multiplier and					
95	Gross Income Multiplier on one parcel.	Yes				
	The solution supports an Apartment or Multi dwelling					
	unit valuation calculator; including rent per unit type					
	(Bed and Bath Count), other income, expenses, vacancy,					
96	collection loss, and capitalization rates.	Yes				Bed/Bath counts are tracked in parcel notes.
	The solution can capture gross rent, vacancy and					
07	collection loss, miscellaneous income, and itemized	,,				
97	expenses, for all property types,	Yes				
	The solution provides for the development of models				;	
	comprised of typical income, expense, vacancy,					
	collection loss and capitalization rate figures that can be applied in mass to parcels based on user defined					
98	selection criteria.	Yes				
 	The solution provides the means to analyze data and	163				
	calculate median and mean rent per unit of measure,					
	expense ratios, market rents, vacancy levels, gross					
	income multipliers, and overall capitalization rates for					
99	any strata of commercial property.	Yes				
	Multi-family property owners often charge a separate	1				
	rent for parking spaces, carports and/or garages. The					
	solution is able to track these rents separately from the					
100	base unit rents.	Yes				
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	The solution can allow user to designate or assign each						
	floor and/or building section or building with a specific						
	income approach or price per unit, or cost etc. whether				ï		
	valued as an independent parcel or a member of a group						
	of parcels that make up an economic unit. Automates						
101	allocation of value to individual parcels.	Yes					
	The solution can allow user to designate or assign each						
	building with a specific income approach or price per						
102	unit, or cost etc. for multi-use properties.	Yes					
	The solution can store net or effective rentable square						
	footage (leasable area) for a commercial property (e.g.,			}			
103	office buildings)	Yes					
	The solution can allow the valuation of commercial						
	property using other methods such as discounted cash						
104	flow and the mortgage equity method.	Yes					
	The solution can enable the user to define, display and						
1	print, line by line, a build-up of the income approach(es)						
	and the build-up of the calibrated cost approach						
105	including the associated land value(s) for a single parcel.	Yes			,		
ŀ	The solution can enable the user to define, display and						
	print, line by line, a build-up of the income approach(es)						
l	and the build-up of the calibrated cost approach						
	including the associated building and land value(s) of						
106	multi-parcel economic units.	Yes					_
1	The solution can allow for a deduction of personal						-
	property value, intangibles, and business value in all						
107	approaches to value.	Yes					
	EXEMPTIONS	_					
	The solution can allow an exemption to be applied to a						
	single or multiple accounts using a percent of value				•		
108	exemption or a fixed dollar amount.	Yes					
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	The solution can process all non-profit and other exempt					
100	properties through the assessment cycle (establish	\/				
109	market/current use values) without generating a tax bill.	Yes				
110	The solution can allow for multiple exemption					
110	calculation types.	Yes				
	The solution provides a table-driven field that can					
111	identify the statutorily exempt accounts.	Yes		ļ		
	The solution can automatically stop or cancel a given		•			
	exemption after a user configured duration or expiration					
112	date.	Yes		ļ		
	Allow for partial exemptions based upon the percentage					
113	of qualifying use or value.	Yes				
	Designate between exemptions granted by classification			İ		
	or designation; provide data fields for date of			1		
114	application, date of site visit and date of approval	Yes				
	The solution can allow for user-defined reports to			ĺ		
	capture data associated with taxing districts,					
	parcels/accounts, assessed values, exemptions, Tax					
115	Abatement, etc.	Yes			ı	
	The solution can identify/flag the property for review]		
116	upon the occurrence of a potentially disqualifying event.	Yes				
	The solution can allow partial exemptions by a					
117	percentage or a specific dollar amount.	Yes				
						Parcels in the Tax Abatement Program can be
					!	flagged with a Special Condition code. This
1	The solution can incorporate necessary functionality to					code can be for informational purposes only,
1	implement tax abatements.					however a % can be applied to calculate an
118		Yes		ļ		assessment based on the exemption program.
	Can record base value and market value for parcels in					
119	the Tax Abatement program.	Yes				·
L'15	The solution can track the beginning and end dates of	103		1		
120		Vos				
120	special property exemptions.	Yes			L	<u> </u>





	FIELD MAPPING AND DATA COLLECTION	· · · · · · · · · · · · · · · · · · ·	
121	If no field data collection tool is available, the solution is able to fully integrate with and continue our use of the Woolpert Mobile Assessor field application.	Yes	
122	On-line field edit logic is under the control of the systems administrator. The administrator is able to set field-level security access based on user log-in. Administrator can also be able to set required fields without extensive programming or vendor intervention.	Yes	This function is handled via MobileAssessor. Vision has an extensive partnership with Data Cloud Solutions and had developed enhanced functionality for the platform's integration with Vision CAMA.
123	The solution allows direct data transfers without requiring an intermediary conversion process or third parties in order to move field data off a field device into the CAMA solution or vice versa. Solution can enable user to establish a record set of property characteristics, images and sketches on a field device (PDA, Laptop PC, Tablet Computer).	Yes	This function is handled via MobileAssessor. Vision has an extensive partnership with Data Cloud Solutions and had developed enhanced functionality for the platform's integration with Vision CAMA.
124	The solution has a mapping component that allows the user to query, view, flag and edit local CAMA and GIS information real-time directly on/from the map.	Yes	Vision CAMA has full featured GIS component included in this proposal that allows the user to query, view, flag and edit local CAMA information real-time directly on/from the map. Vision does not provide functions to edit ESRI ArcGIS coordinates from within the user interface.
125	The field mapping solution can produce optimized routes and corresponding turn-by-turn directions for multiple parcels.	Yes	This function is handled via MobileAssessor. Vision has an extensive partnership with Data Cloud Solutions and had developed enhanced functionality for the platform's integration with Vision CAMA.
126	The field mapping solution can function with both a mobile connection and in a disconnected environment.	Yes	This function is handled via MobileAssessor. Vision has an extensive partnership with Data Cloud Solutions and had developed enhanced





•			functionality for the platform's integration with Vision CAMA.
127	The solution's field and office mapping components allow real-time thematic mapping and dynamic labeling of any attribute in the CAMA system. For example, the user can view parcel improvement grades as unique colors on the map and if the grade is changed in the CAMA database, the map automatically reflects the change by changing the corresponding parcel color.	Yes	This function is handled via MobileAssessor and within the Vision GIS Module. Real-time thematic mapping and dynamic labeling of parcel attributes is available in the CAMA system. Users can view parcel improvement grades as unique colors within the Vision GIS Module, and if the grade is changed in the CAMA database, the map automatically reflects the change by changing the corresponding parcel color.
128	On the mobile application, the solution can apply a flag "inspection complete" with appraiser ID and date/time stamp when the inspector is at the parcel with a single mouse click or "button" push.	Yes	This function is handled via MobileAssessor. Vision has an extensive partnership with Data Cloud Solutions and had developed enhanced functionality for the platform's integration with Vision CAMA.
129	The solution can enable the user to export or download specified data or images from CAMA and/or GIS databases to a field device (PDA, Laptop PC, or Tablet Computer).	Yes	Vision 8 is fully integrated with Data Cloud Solution's MobileAssessor. This integration eliminates the need to "download" or "export" to the device.
130	Able to edit data in the field without record locking entire downloaded/cached parcel set. Allows multi-user editing with conflict management functionality in the event multiple users edit a parcel record at the same time.	Yes	This function is handled via MobileAssessor. Vision has an extensive partnership with Data Cloud Solutions and had developed enhanced functionality for the platform's integration with Vision CAMA.
131	CAMA field solution allows dynamic access to query, view and update source data including map data when a connection is available, but still supports disconnected editing and mapping when no connection is available.	Yes	This function is handled via MobileAssessor. Vision has an extensive partnership with Data Cloud Solutions and had developed enhanced functionality for the platform's integration with Vision CAMA.



132	Mobile solution runs on tablet, regardless of OS.	Yes	Vision 8 is Fully integrated with Data Cloud Solution's MobileAssessor and is available on MobileAssessor supported operating systems. This function is handled via MobileAssessor.
133	Can "download" a day's inspection record set (parcels) as work for the appraiser.	Yes	Vision has an extensive partnership with Data Cloud Solutions and had developed enhanced functionality for the platform's integration with Vision CAMA and allows the creation of inspection parcel sets supported by MobileAssessor.
	GENERAL FUNCTIONAL REQUIREMENTS		
134	The solution can enable the user to query an account by number, name, situs address, mailing address, plat and Geo Code, or by the use of a wild card.	Yes	
135	The solution allows the appraisal of parcels for quarterly reassessment while allowing a future year reassessment simultaneously. Quarterly reassessment should utilize valuation tables for the current year while allowing the reassessment year to utilize valuation tables for the future reassessment.	Yes	
136	The solution can calculate legally mandated files and reports to satisfy archival requirements for the Land Book and assessment notices.	Yes	Vision CAMA is compliant with Virginia mandated files and reports. In addition, we worked with the VA Department of Taxation to provide mandated reports in state-required formatting eliminating several steps in the process. Vision CAMA provides value calculations, and Tax extensions are provided by your Tax Solution.
137	Stores an audit history of events and previous data on all records.	Yes	



138	The solution provides a secure, auditable, and efficient method for batch uploading changes to property account Information from a data file, such as adjustment codes to properties; ownership/ address changes, notes on multiple parcels simultaneously; Zoning, tax district, lot size, jurisdiction from GIS or other County solutions (Auditor, Building Permits); & any other data field as authorized by the system administrator. Also is reversible by the system administrator.	Yes	Reverse is available via a table or system restore, but not through the user interface.
	The solution can allow changes to occur by individual		
139	account or groups of accounts.	Yes	
	The solution provides a method to recalculate and		
140	correct values for prior years.	Yes	
141	The solution has user-defined "flags" and notification triggers for multiple purposes.	Yes	Vision allows for flags throughout the platform; data can be reported out through dashboards, but notifications are not currently supported.
142	Can document individual customer comments in the database as separate records. Able to categorize some notes as public, other private.	Yes	
143	The solution provides a computer-based training (CBT) program and user manuals that can be used for staff training for common functional topics.	Yes	Vision CAMA comes with an on-line help that is available from any screen throughout the system. Vision also hosts monthly Webinars on specific functional topics, each Webinar is recorded and available on the Vision Customer Portal within our learning library. The embedded Help Manual is printable.
144	The solution can calculate and generate the assessment portion of the Land Book.	Yes	





145	The solution has a customer self-service tool that is web- based and IVR. The solution can allow customers to initiate name and/or address changes and if necessary, include a list of supporting documents required to complete the change.	Yes	Custom	Vision has a Taxpayer Web Hosting online portal, which allows taxpayers to provide feedback and questions on the parcel. Form and document submissions would be handled through an interface with a third-party provider, as part of a Change Order associated with the scoping of this effort.
146	The solution has client-configurable screens available for external users that contain data from the database as well as images associated with tax accounts and provide current data as well as historical data.	Yes		A user profile can be configured for "Taxpayer" kiosk terminals
147	Solution has digital dashboards for workers to see pending assignments. Allows managers to see summary of employees' work.	Yes		Via Vision Analytics dashboards
148	Value notifications show the following data: - Name and mailing address - Situs address - Abbreviated legal description - Tax code area - Prior year's and new year's values for all value categories, with breakdown between land and building (e.g., market values, current use values and senior exemption values, when applicable) - A total value that is the basis for the following year's taxes.	Yes		
149	Solution includes a customer case management report or notification to remind appraiser if an issue hasn't been resolved within X business days.	Yes		Yes via Reports. Vision does not currently support notifications, but can provide sortable Reports and Dashboards that highlight assignments to a Supervisor.
150	The solution can support links to multiple digital photographs for each structure and each parcel.	Yes		





151	Can take photos with mobile device and have them linked to the property record or building record automatically.	Yes	
152	The solution can allow digital images to be linked to and deleted from each structure individually or in batches.	Yes	Images can be associated individually to each parcel through the Vision UI. The images taken in the field with MobileAssessor will synch up to the corresponding parcel in Vision seamlessly. Association of images to parcels in batch is not available through the UI, however, this service is available through the Vision Data Team as part of the annual support package.
153	The solution can allow for capture of any image, such as original application forms and supporting documentation that would be linked to the account.	Yes	
154	The solution can edit history entries that are the result of data entry errors. An audit trail can show that the history entry was corrected, when, by whom, and what the previous entry was.	Yes	
155	The solution can support the preparation of Valuation Notice of assessed value electronically.	Yes	
156	The solution can process estimates of total taxable value or projections of "what if" situations at any time of the year.	Yes	
157	The solution can allow users to export all tables to various PC desktop applications in editable formats.	Yes	Additionally, all cost tables in Vision can be updated directly through the Vision UI.



158	When the focus of the solution moves from one field to another, the exited field will immediately check for proper data format rather than waiting until the user saves the screen. For example, when the user types an alpha character into a numeric-only field, then tabs to the next field, the first field will immediately flag the problem for correction. Alternately, when the record is saved, the cursor focus will automatically go to the first problem field, then tab progressively through the other problem fields.	Yes			
159	Solution has the ability to flag a parcel or permit for revisit date.	Yes			
160	The solution can support a workspace, or copy of the database, for staff to work ahead on updating supporting and look-up tables for the next roll, and a process to update the current production database when it is unlocked.	Yes			
161	The user is able to generate and print value notifications in-house and through an outside vendor.	Yes			
162	The solution provides global update and upload capabilities for groups of records that include common characteristics. The solution can also enable user to finalize the values of selected groups of records.	Yes			
163	Can assign each parcel in a market area and submarket area to a physical inspection cycle for audit once each 6 years.	Yes			
164	If necessary, the solution can retain all tax calculation information for individual accounts.			No	Vision CAMA calculates Values. The property values are bridged into the City's Tax solution where the tax calculation is calculated.



165	The solution allows the user to add user-defined notes and comments that become part of the parcel's history. The notes are categorized based on user-defined rules. Examples include notes from the assessment process, notes from boundary line adjustments, notes relating to the market assessment of the property, etc.	Yes		
166	The solution can keep all changes, notes and updates associated with the property with client control of which actions/updates to log.	Yes		
167	The solution can capture all update activities and store them in the history of a property, along with the dates of when each activity is updated. Examples include but not limited to: - Segregation - Combinations - Cancellations and supplements - Name changes - Address changes - Revaluation of property - Changes to the abbreviated legal description	Yes		
168	The solution can allow the user to inactivate and reactivate an account for assessment purposes only (regardless of whether or not taxes or special assessment fees are still owed on the property). Active and inactive dates need to be displayed prominently on the main parcel screen. The solution can permit users to view historic information on inactive/retired properties/accounts.	Yes		Active and inactive dates are automatically displayed prominently on the parcel audit screen. Users can enter the Active and Inactive on the Vision Account Information Screen.
170	The solution can allow the user to create custom valuation notices without vendor / programmer assistance.	Yes		via Vision Mail Merge





171	Integrates with Norfolk Air, BasicGov Permitting, Laserfiche, PCI's myRevenue system, AppraisalEst, Clerk of Court systems and Tax Abatement system. PCI integration should include, but not be limited to, statuses (tax, parcel), valuation (assessments, abatements), transfers, situs addresses, legal descriptions, ownership, effective dates, GPIN, and general parcel information with daily file generation.	Yes	Standard and Custom		Vision has standard integrations with over 50 Tax solutions, several third-party tools, as well as provides custom integration points via API or the import/export process. Vision has defined the included integrations in the configuration/pricing section of this proposal. Additional import / export pricing can be provided upon request.
. 172	The solution allows a data file to be produced on command to be used as a comparison tool to verify that the Assessor's Office's CAMA system and PCI's myRevenue System match in terms of total accounts, assessment values, parcel status, effective dates, and other elements to be determined. The file should be able to be generated in various formats using a selection criteria chosen by the user before executing the creation of the file. (e.g. Only include the most recent assessment value or choose to include multiple assessment values based on the dates chosen by the user.) The data file should be produced in common readable formats such as	Yes			
173	The solution can accommodate all State constitutional and statutory assessment and reporting requirements, as well as Virginia Department of Taxation rule changes.	Yes			
174	The solution allows a data file to be produced on command to provide to mail vendor for printing and mailing. The file should include data elements such as but not limited to Account Number, Owner Name, Owner Mailing Address, Current Assessment + 2 Previous Years' Assessments, Legal Description, Tax Rate, etc. The data file should be produced in common readable formats such as but not limited to TXT,	Vos			Tax Rate fields will need to be included in the implementation configuration. These rates will need to be imported from your Tax solution
174	XLXS,etc.	Yes			provider or manually maintained.





175	The solution can support maintaining and processing multiple years of property data (characteristics, valuation, cost tables, etc.) for at least the current and prior 6 years.	Yes	Vision maintains full historical Data for each year of fully converted data and for every year you use the solution.
176	The solution allows authorized users to certify a new property value on a mobile device after a new construction inspection is performed.	Yes	
177	The solution can allow user to create neighborhoods of properties by user defined parameters, such as: property account number, geocode ranges, GIS polygon, property type codes, building class, building style, etc And save data to a file for future analysis.	Yes	
178	The solution provides online help for all levels of the solution, including general help screens, transaction help, data entry help, and help at the field level. Help features are available on disconnected field devices.	Yes	Vision CAMA has detailed online help documentation. MobileAssessor provides Online help for the Administrative Module. Online help is not available for the MobileAssessor field devices.
179	Solution allows mass input of value overrides from an outside source.	Yes	Vision allows for mass input of Value overrides via our Data Team.
180	The solution has the ability to make value corrections as a work-in-progress pending an activation date.	Yes	
181	The solution allows users to copy inspection data, sketches and parcel characteristics from one property account number to another or to multiple accounts.	Yes	
182	Customer self-service web portalto show property characteristics as of a previous date.	Yes	Vision CAMA provides the ability to view property characteristics as of previous dates, this can also be viewed in a Customer Access Station within the Assessor's office. Views of previous dates on the Vision hosted Web Portal can be achieved but is a custom configuration and can be priced upon request.



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183	The solution provides the ability to recalculate values for a minimum of three prior years based on changed property characteristics but utilizing cost and land tables in place for that valuation year. We envision a separate assessment record for each quarterly update and annual reassessment. Each of these records should be updatable in accordance with the valuation tables assocciated with the specific year and quarter.	Yes	5	
184	The solution can allow the appraiser to - Search field device for parcel characteristics, images and sketches in an inspection area using criteria specified by the user. Gives user option to set nested sort order of search output (e.g. By NH, by Geocode, by PAN) The solution can prompt the user with selection criteria and sort order and identifies # of parcels in print run; then allows user to cancel or proceed with print run to generate hard copies of field sheets.	Yes		Vision fully integrates with Data Cloud Solutions MobileAssessor platform and supports all features of the MobileAssessor platform. Vision CAMA allows for printing of Field Sheets (if not using the mobile device). Mobile Assessor supports sort order.
185	The solution provides multiple fields to identify different property types (commercial, residential, industrial), etc., uses (property class codes), and classifications (taxable, exempt, etc.).	Yes		
186	Solution allows user to build ad hoc queries & reports by any combination of criteria with output exportable to industry standard programs (e.g. MS Excel, XML, SQL database, MS Access), store the queries and share them with other users and teams.	Yes		
187	The solution can generate a "top 10" property owner list within a taxing district report, based on the owner's name, including aliases or 'Also Known As', or 'Doing Business As'.	Yes		



188	The solution can handle recording returned correspondence (mail/email) using barcoding or other current technologies without using keyboard technology.			No	Vision CAMA supports barcode printing, but does not currently support barcode reading. This is on our roadmap for 2022.
189	The solution provides audit trails for the correction of current and prior years values.	Yes			
190	The solution provides a table to maintain unique identifiers for roll correction types.	Yes			
191	The solution can support hyperlinks to standalone scanned images stored in other City databases/systems/file locations.		Custom		Vision CAMA supports the connection to certain types of databases. This feature can be provided upon identification of specific databases and scoping of requested needs.
192	The solution can support the scheduling of batch jobs at a specific date and time.	Yes			
193	The solution can preserve all historical information about a property/account.	Yes			
194	The solution can allow for user-identified on-line viewing without access to update capabilities. (Security access profile for read-only users)	Yes			
195	The solution can allow users to create value notification letters in batch, by specific property account numbers or other user defined criteria.	Yes			
196	The solution can allow printing and mailing of valuation notices of selected groups of properties or individual property accounts as many times as needed during an assessment year. Date of original notice drives appeal dates, regardless of reprints.	Yes			
197	The solution can enable the user to quickly read and write data between the assessment application and SPSS (or similar) software.	Yes			





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	The solution can allow the user to edit property					
ŀ	groupings by removing or adding to the list and saving					
198	these lists for future reference.	Yes				
	The solution can utilize hyperlinks to related files, such					
	as Word documents, Excel spreadsheets, scanned					
	documents, data files, etc., from within the proposed					Vision's associated documents module will
	solution. Preferably, the solution can launch the					allow users to attach electronic documents
199	associated file with a click on the hyperlink or field.	Yes			•	directly to corresponding parcels.
	The solution provides summary screens. Example:					
	Allows the user to view all data pertinent to the current					
	year's assessment, including the appraised (market)					
200	value and assessed (taxable) value.	Yes				
	The solution allows user-definable edits for individual					
	data fields (e.g., Maximum house size = 25,000 square					
	feet; nbr of swimming pools greater than 1) at the point					
201	of data entry.	Yes				
	The solution allows users to search for accounts by					
	owner name, Taxpayer, doing-business-as, house					
	number, street, APN, geocode #, plat #, plat name, legal					
	description, or other desired fields. The solution					
	searches by exact word/number/phrase, or a portion of a					
	word or number. For example, to find a parcel					
	belonging to John Frostmeyer, users are able to search					
	by entering 'meyer' to generate results containing the					
202	string 'meyer' in the name field.	Yes				
	The solution administrator has the ability to define		-			
	options (such as automatic recalculation, by specific					
	time/date, etc.) for recalculation of all associated					
203	property records.	Yes				







204	The solution can allow for batch import and export of data (using industry standard file types such as .xlsx, .mdb or dbf files) into or out of the CAMA solution, for all appraisal table data. The solution applies appropriate data validation rules and ensures the user has the security permission to transfer the data.	Yes			Vision CAMA has batch import capabilities. Selected processes can be accomplished by users with appropriate permissions. Importing to certain fields may require the Vision Data team.
205	The solution provides valuation calculation reports by property class, property type, submarket, neighborhood, that include the total assessed value and parcel count. Solution provides a further breakdown between new construction totals and market-based assessment changes.	Yes			
206	The solution provides automatic coding or flagging of parcels based on user-defined criteria that prevents a valuation notice from printing.			No	Vision does not provide Automatic Coding of parcels. The parcels must be manually flagged to prevent printing. However, fields can be marked as required or with validation rules.
207	When the user processes a change for a prior year's assessment, the solution can automatically change the corresponding tax information for subsequent years without additional manual data entry by the Treasurer's staff.		Custom		Vision can provide export to the preferred tax solution that allows the Treasurer to import directly into their solution. Pricing for this specific export can be provided during the contracting process ore executed during implementation as a Change Order when the specific fields and formats are scoped.
208	The solution can permit users to view historic information and comment fields in their entirety regardless of account status.	Yes			via prior year's database
209	The solution can display and store an image of the value notification letter.	Yes			
210	The solution can allow adjustments to be applied in mass by using a "what if" calculation that allows the user to check the results and accept or reject the outcome.	Yes			

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	The solution allows the transfer of "What If" analysis	T	
211	1	Yes	
	GIS		
212	The mapping solution can export to .pdf and print/plot high quality standard size (Letter, Ledger, Tabloid) and large format D and E size maps.	Yes	
213	The solution can populate a feature class's (Esri versioned SDE geodatabase) attribute information with CAMA data (e.g. PIN) by associating a CAMA PIN and an ArcSDE polygon without re-typing the PIN.	Yes	The Vision GIS module allows the user to create layers within the Vision GIS user interface. These layers can be labeled with fields from the Vision CAMA database. Due to security concerns from GIS departments, Vision does not allow CAMA users modify the County's external GIS department's ESRI SDE databases.
214	The solution can use different GIS datasets for identifying subject and comparable sales such as quality, condition, age, neighborhood, other influences, etc.	Yes	
215	The solution can include a well-documented database architecture and table structures that provide simple, secure access for GIS technicians.	Yes	Vision Data Architecture is considered Intellectual Property, Vision achieves this requirement by having an extensive Table Maintenance Module as well as providing Table Lookup information within the solution. Vision CAMA has a full featured GIS Module and well-defined GIS procedures in place for GIS technician as well as general user access.
216	In real-time, the solution can derive and use area information from GIS datasets for valuation and display purposes. For example, as parcels are split and/or combined or GIS datasets are updated, the amount of attributes like buildable area or soil type within impacted parcel(s) are derived from GIS real-time.	Yes	





217	In real-time, the solution can derive and use information from GIS datasets for valuation and display purposes. For example, as parcels are split and/or combined or GIS datasets are updated, the value for attributes like zoning, tax code area, freeway noise, etc. for impacted parcel(s) are derived from GIS real-time.	Yes		
218	Solution is able to accurately calculate and allocate either percentage of parcel or total acreage after a segregation breaks the parcel into children.	Yes		Vision CAMA has well-defined and feature-rich parcel administration tools for splits including into multiple parcels. Certain features require manual entry of percentages or acreage to ensure complete accuracy with the associated Deed and plat.
219	This solution can support native Esri raster and vector formats.	Yes	1	
220	The solution provides the ability for the CAMA system can view and query GIS information (e.g. GIS acres, CreateDate, EditDate, Acreage Verification, Shoreland/Tideland interest, Seg Source, etc.) about a parcel and the GIS system can view and query CAMA information (e.g. Situs Address, Owner/Taxpayer, Legal Description, Zoning, etc.)	Yes		
221	The solution can maintain synchronization between the CAMA database and the GIS database. For example, the user can be assured that parcels in the GIS database have a corresponding parcel in the CAMA database and parcels in the CAMA database have a corresponding parcel in the GIS database.	Yes		
222	The solution provides a direct connect to Arc (ESRI) products: import MSD, Arc Pro Project and [provide a URL link to ARC Online.	Yes		Assuming files are in input formats that can be ingested by Vision 8 CAMA





223	The solution provides a mechanism for dynamically receiving a selected set of parcels and attributes from a GIS application.	Yes			
224	The solution provides a mechanism for dynamically passing a selected set of parcels and attributes to a GIS application.	Yes			
225	The solution can export to KML to send to title companies and other entities.		Custom		Vision can provide exports in XML, CSV, text, and other preferred formats, and these exports can be generated ad hoc through the Report Writer or Vision can develop a custom export for these purposes. Pricing for this specific export can be provided during the contracting process or executed during implementation as a Change Order when the specific fields and formats are scoped.
226	The solution has an Office mapping component that allows the user to query, view and edit production and property characteristic database CAMA and GIS information real-time directly on/from the map	Yes			
	LAND RECORDS			<u>.</u>	
227	The solution can store and display a full or abbreviated legal description.	Yes			
228	The solution creates new property accounts due to new subdivisions for the future assessment year. For example, plats recorded prior to June 30, 2021 are segregated and assessed for 2021. Plats recorded after June 30, 2021 through June 30, 2022 are to be assessed for 2022.	Yes			





229	The solution can combine properties in an automated manner that requires minimal data entry by the user.	Yes		Vision offers Parcel Administration Tools. These tools will allow the user to copy parcel data from one parcel to unlimited vacant parcels, including but not limited to sketch, images, construction details etc. Vision Parcel Administration also allows the user to move a building from one parcel to another.
230	The combination transaction is recorded such that the parcel history can be easily reconstructed.	Yes		·
231	Deactivation of parcel - Sometimes have an immediate need for possession and use agreement (temporary seg into a parcel to be used for eminent domain). Parcel is deactivated after it's converted to ROW.	Yes		
232	The solution can allow the copying/pasting/moving of data (including photos and sketches) from a parent parcel to the descendant parcel(s) to be based on user-defined criteria or business rules. For example: User decides whether or not valuation flags, situs address, etc., should be copied/pasted/moved to the resultant parcel(s).	Yes		
233	The solution can interface in real time using a reference number with the Auditor's Imaging solution in such a way that a parcel's legal description in the solution is displayed from the recorded image and the user has the ability to edit the legal description if needed.		Custom	Vision can provide interfaces with various solutions. Pricing for this specific interface can be provided during the contracting process or executed during implementation as a Change Order when the specific fields, formatting, and file types are scoped.
234	Add/remove parcel and change ownership all at the same time.	Yes		
235	The solution can allow for an unlimited number of properties to be combined. (If not, please indicate the maximum number of properties that can be combined in a single combination process.)	Partial		In Vision 8, parcels are combined using a manual process. Vision also provides a splits and combines wizard to facilitate ease of Parcel Administration.





	PARCEL MAINTENANCE				1
236	The solution provides the ability to associate multiple contacts with a single account and their role (owner, tax rep, etc.).	Yes			
237	The solution provides configurable functionality to alert the user if the ownership changes for selected programs.	Yes			Vision Reports can be created to ensure programs are reviewed during ownership changes. Vision does not currently support alerts.
238	The solution can automatically assign an ownership record number when creating a new owner.			No	New owners can be manually assigned an ownership record number when the owners are created.
239	The solution can accept mailing or situs updates from external data files which allows the user to edit the information manually using standard word processing functionality.		Custom		Vision can build custom imports from various external data sources. Pricing for this specific import can be provided during the contracting process or executed during implementation as a Change Order when the specific source, fields and formats are scoped.
240	The solution can move associated document images, sketches, and photos when characteristics have been moved or copied to new parcels.	Yes			
241	The solution provides the ability to copy and/or move selected property characteristics (either the land or improvements) from one property to one or more properties, or within the same account.	Yes			
242	The solution provides the option to choose an existing real property account from which to automatically copy specific fields (such as legal description, map tax lot, code area, situs, etc.) when creating a new account.	Yes			
243	The solution has an automated mechanism to create multiple new accounts, in bulk, for a new development.	Yes			
244	The solution can allow the user to edit, add, change or delete building permit information.	Yes			





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	The solution can maintain a complete historical record of						
ľ	ownership, values, and taxes configurable by the client						
245	and can search for historical owners.	Yes					
ł	The solution provides a find and replace feature for mass						
246	corrections to mailing addresses.	Yes					
	The solution can track the history of mailing address						
247	changes.	Yes					
	The solution provides mailing address fields that meet						
248	domestic and international postal standards.	Yes					
	The solution provides a summary for all records						
	associated with any parcel (e.g., mobile homes and land						
	parcels, parcels with multiple structures, contiguously						
	assessed parcels), while maintaining the individual						
249	records.	Yes					
	Ability to work in past, future and current assessment						
250	year	Yes					
	The solution can allow the user to mass update data						
	characteristics, notes, permits, value information, etc. for						
	groups of new subdivision accounts based on client-						
251	defined criteria or business requirements.	Yes					
	The solution can allow for situs addresses that are stored						
	in the Assessors application and associated with one or						
	more buildings, with a primary situs address identified			}			
252	for each parcel.	Yes			ı		
	The solution can report properties with an exemption						
253	when an ownership change occurs.	Yes					
	For each owner name record, the solution has an						
	associated field to track percent ownership relative to a						
254	Property Account Number.	Yes					
	The solution can allow the County user to indicate a						-
255	primary situs address for each account.	Yes					
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	The solution provides a table of commonly used city, state and zip combinations that facilitates quick entry of							
256	these fields.	Yes						
	The solution can handle single-entry or mass-entry of						·	
	address changes, specifically regarding many accounts							
257	with the same owner.	Yes						
	The solution can record the parcel maintenance							
	transactions such that the parcel history can be							
258	reconstructed, including multiple parents.	Yes			•		<u>. </u>	-
	The solution has a means to group accounts by a pre-							
	determined common data element such as: name,							
	address, or other key data element the County may							
259	determine appropriate.	Yes						
	The solution can track the changes in names and have it							
260	available for customer service representatives.	Yes	<u> </u>					
	The solution is able to classify owners as: Owner, Buyer,							
	and In-Care-Of, and store and cross-reference 'Doing							
261	Business As' (d/b/a) name for the owner.	Yes		_	-	-		
	The name fields are large enough as not to require any							
262	abbreviating.	Yes						
	The solution can update (or create a method to update)							
	the names and addresses in/for other applications that							
	rely on the new property tax solution for the source of		ł					
263	name and address.	Yes						
	The solution has a means to group accounts by a pre-							
	determined common data element such as: Name,							
	address, UBI (Uniform Business Identifier), or other key							
264	data element the County may determine appropriate.	Yes	-					
	The inquiry by name is a wildcard query and can query							
	against the three name fields - Owner, Buyer, and In-							
265	Care-Of-or Doing Business AS (DBA).	Yes				<u>-</u>		·





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266	The solution can search by alternate ownership names to identify all properties owned by that taxpayer/entity.	Yes			
200	The solution can allow an ownership number to be	163			
267	associated with multiple property accounts.	Yes			
	PERMITS	1.05			
	The solution can allow for the import of permit	<u> </u>	1		
268	information from other applications.	Yes			•
	The solution can maintain history of all permits issued			_	
269	on a property.	Yes	-		
270	The solution has the ability to move, or copy permits from one account to another. The user is able to add, change or delete building permit information in the CAMA application.	Yes			
271	The solution (at a minimum) has the ability to store building permit information such as: - Date the permit was issued - Jurisdiction issuing the permit - Permit number - Permit type, and accept permitting information from other sources.	Yes			
	REGRESSION				
272	The solution has the ability to use geographically weighted regression for both residential and commercial property.	Yes			Via importing regression values into the Vision Tables
273	The solution can perform multiple regression analysis for residential and commercial property.	Yes			The solution integrates with 3 rd -party statistical packages to complete regression analysis.
274	The solution can allow comparable sale prices to be adjusted based on coefficients produced by the regression analysis.	Yes			
275	If regression is not provided by the solution, a proven track record of compatibility with AppraisalEst by Spatialest application.	N/A			If desired, Vision can discuss an import of data from the AppraisalEst application. This would be included as part of the scoping in the contracting process.





	REPORTING				
276	The solution has the capability to enable the creation of custom reports.	Yes			
277	The solution has the ability to produce forms or form letters en masse for a selected group of accounts, or for an individual account.	Yes			·
278	The solution can generate reports that allow management to forecast workloads, monitor workload status, and make assignments.	Yes			
279	After applying mass adjustments, the solution can allow for user-defined audit reports showing before and after market values and other criteria as determined necessary.	Yes			
280	The solution has the ability to send queries and reports to printer, fax server, e-mail client, or file in several application formats (Example: HTML, Acrobat, Word, Excel, etc.).	Yes			
281	The solution has the ability to store static results of a query.	Yes			
282	The solution has a method of joining parcel attributes stored in the CAMA database to Esri feature class.	Yes			
283	The Report Writer solution can support the import of form files in standard graphic formats, such as PDF, JPG, TIF, WMF, TXT and EPS.		Custom		Vision Report Writer fully supports the export of Reports to various file formats. Vision can build custom imports from various external data sources should the City desire. Pricing for this specific import can be provided during the contracting process or executed during implementation as a Change Order when the specific source, fields and formats are scoped.
284	The solution has the ability to view reports on-line with drill down capabilities to the source record level as well as any scanned images.	Yes		·	



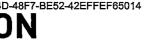
285	The solution can support searching by multiple data elements simultaneously and support partial search strings or wildcards. The solution can allow for searching, using common operations (>, <, =) and Boolean operators (AND, OR NOT). The solution can support phonetic/Soundex searching of text fields.	Yes		No	
287	The solution can produce error and warning reports that identify records with actual or potential valuation or data entry problems.	Yes			
207	SALES VALIDATION AND ANALYSIS	163	-		
288	The solution provides a method to produce and analyze sales ratio statistics by user-defined groups of properties.	Yes			
289	The solution can allow for the automated selection of comparable sales based on either a statistical algorithm utilizing a set of user-defined criteria and/or a user defined weighting algorithm. Either solution can include distance from subject as a user-defined criteria. This solution allows user to design reports for standardized BOE appeal response.	Yes			
290	The solution can track sales or ownership changes in the sales history file - capturing sale type, sale date, instrument (deed type), prior ownership ID, and comments.	Yes			
291	The solution can link multiple parcels which sold on one deed.	Yes			
292	The solution can summarize land, improvement, value and sales ratio data from multiple accounts included in one sale transaction.	Yes			







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293	The solution can allow a user to make corrections and updates to the sales module on a per parcel basis or in batch.	Yes		
294	The solution can allow sales records to be exported into other applications such as Access and in statistical software such as Excel, AppraisalEst, etc	Yes		
	The solution can maintain a sales history file with valuation capabilities that captures and freezes the property characteristics at the time of the sale, while supporting corrections (based on historical valuation tables) of property value and characteristics. The solution can allow for manual edit of property characteristics in sales history file.			
295	The solution can add the assessed values for multiple parcel sales involved in a single transaction; the combined sale price and total of assessed values will be used singularly in sales ratio reporting and analysis.	Yes		
296	The solution can allow for systemic purging of sales records by date ranges, according to Virginia State law.	Yes		Vision keeps an audit trail of all edits. For Security purposes, purging the database through the UI is not available. Data purge is only available through our support staff with proper written approvals from the City.
297	The solution can allow sales in the sales history file to be flagged for source, validity codes, sale type, property type, and instrument (deed type), and qualified/disqualified state codes for the inclusion or exclusion of sales data in studies and reports and for the Virginia Department of Taxation Sales Ratio Study.	Yes		





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	The solution can allow recalculation of value at point of					
	sale if subsequent to sale new information prompts					
l	appraiser to edit / correct sale record data to accurately					
298	reflect building or land data at point of sale.	Yes				
	SYSTEM DESIGN					
299	The solution has customizable levels of security.	Yes				
	The solution security allows for the designation of					
	required, recommended, and read-only fields according			Ì		
300	to system access.	Yes				
301	The solution can clearly display mandatory fields					
301	(different shading, color, or other mechanism).	Yes				
	The solution can use Microsoft standard capabilities,					
	such as copy, cut & paste, multiple windows open					
	simultaneously, split screen, cascading, undoing					
302	complete edit changes, etc.	Yes		l		
303	The solution has a spell-checking function for memo and					
303	comment fields.	Yes				
	The solution provides user-definable tool bars and menu					
	options. These settings are specific to a user or a					
304	desktop, i.e., each user can have their own configuration.	Yes				
305	The solution can clearly identify for each property the					
303	method used to develop the assessed value.	Yes				
	The solution has one screen where all related values					
ł	(land, improvements and total values) are totaled by					
}	year by user-selected criteria. Examples include city-					
	wide, district, submarket, neighborhood, property class,			}		
306	etc.	Yes		}		
	SYSTEM SUPPORT					
	The solution can allow an account or group of accounts					
	to be "locked" and prevent recalculation of value once					
307	the lock feature is turned on.	Yes				
					L	<u> </u>





OVISIONGOVERNMENT SOLUTIONS

308	The application provides an automated process (e.g., web service) to update cost tables as needed.	Yes	Vision cost tables can be updated as needed through the Vision UI by users with permissions to update tables
309	The solution can allow tables from the prior year to be copied and updated to the current year.	Yes	
310	The solution can add user-defined cost tables without program modifications.	Yes	
311	The solution produces a report listing all or selected portions of the cost tables and depreciation tables used for each valuation year.	Yes	
312	Solution allows for multiple cost and depreciation tables based on effective age and/or grade, property type and location.	Yes	
313	The solution will allow valuation tables to have overlapping start/end dates dependent upon whether the appraisal is for the current year or reassessment year.	Yes	Vision uses effective dating to manage current and reassessment year processes
314	The solution can keep historical copies of all cost tables by assessment year in at least two formats: 1) Read Only 2) Active (For correcting prior years values)	Yes	Via Historical DB
315	The solution provides an automated approach to valuing land, utilizing rate tables that can be set up on an acreage, square foot, front foot, or site value basis by year.	Yes	
316	After changes to any value related table have been made, the solution requires the user to manually authorize its deployment to the database so that no value changes occur until approved by the user.	Yes	Vision calculates values on the fly in real time to enable the user to see changes in value as they occur. These changes are not posted until the user commits (saves) the edits.
317	Upon user authorization, table changes can automatically recalculate all associated property records.	Yes	
318	The solution allows the user to override automatic recalculation and apply updates at specified time.	Yes	

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	The solution can enable users to view all tables on-line			
319	(on screen), or in printed form (e.g., land rate tables, land add on tables, cost tables, etc.).	Yes		
	TAX ACCOUNTING			
320	The solution can allow the user to develop taxing districts and special assessment districts, assign a unique code to each district using any combination of letters and numbers is valid for the code.	Yes		
321	The solution provides for each taxing district, an unrestricted number of levying authorities and authority categories each with its own effective date and value base.	Yes		
	WORKFLOW MANAGEMENT			i ,
322	The solution can incorporate a workflow processing intelligence so that parcels can be assigned to an appraiser, a specified work group, or can be manually reassigned to different appraisers.	Yes		Vision can assign parcels during the implementation process. Vision CAMA allows the user to make mass updates to fields within the CAMA solution using the Mass Update Tool. (Mass updates can also be driven from the GIS Map).
323	Solution produces reports on appraisal productivity; how many appraisals performed by appraiser, by appraisal type, by neighborhood, by date range, etc.	Yes		Vision Analytics provides productivity Metrics and is included in this proposal (configuration required). In addition, the Report Writer Tool allows the user to create reports to meet these needs.
324	System produces BOE printed appeal packet, including photos, cover letter, sketches, etc.		Custom	The user can develop Appeals Packets using the included Report Writer and Mail Merge tool. We have users that have created these packets with SSRS and Crystal Reports.
325	Can send automatically generated letters to any property owner regardless of the type of exemption either individually or in batches when exemption is about to expire.		Custom	Letters can be generated through the solution in various forms. However, a report must be generated to send in batch.





326	Automatically assigns properties for inspection based on recent sale date, permits or customer request.	Partial			Parcels can be assigned for inspection manually, using data from stored reports around recent sale date, permits, or customer request.
327	The solution can include a graphical tool that provides the ability to develop a workflow/process model with routing and control points.	ratua		No	Data around inspection assignments can be graphically displayed using Vision Analytics dashboards
328	The solution can include a graphical tool that provides the capability for simultaneous as well as sequential process flows.			No	See above.
329	The solution workflow tool can trigger and log automated events such as form letters, correspondence, e-mail, account flags, etc.		,	No	Form letters and correspondence can be sent via the Vision mail merge tool. These are not currently triggered by an automatic workflow process.
330	Workflow manages the full segregation/combinations and lot line adjustments from the recording of official documents, creation of accounts, map (GIS) updates, and valuation (CAMA).		·	No	This would be done via the GIS module.
331	The solution provides automated workflow capabilities that are configurable.	Yes			
332	The solution provides the ability for the client to identify workflow queues, routing, notification, process indicators, and sign-off authority at defined control points with individual user-defined sorts and filters.			No	Workflow queues are available through Vision Analytics or the Report Writer. Routing is completed through MobileAssessor.
333	The solution provides the ability to track and report the routing of predefined processes and user-defined production performance measures.	Yes			Vision Analytics dashboards provide measurements of productivity and performance.
	MISCELLANEOUS		- <u>.</u> .	6	





334	The solution has the ability to receive applications and filings submitted online.		Custom	Vision has the ability to accept imports or connect with 3rd party tools for on-line forms and submissions. Pricing for this specific import can be provided during the contracting process or executed during implementation as a Change Order when the specific source, fields and formats are scoped.
335	The solution can accommodate all State constitutional and statutory assessment and reporting requirements, as well as DOR rule changes.	Yes		Vision is compliant with current Virginia constitutional and legislative requirements. In addition, any regulatory or legislative requirement changes are included in annual maintenance.
336	The solution provides the ability to create notes that can be attached to any record, and that can also be categorized by type, with customizable sorts, filters and displays.	Yes		
337	The solution can support the scheduling of batch jobs (updates, reports, processes, etc.) to execute automatically at a specific date and time.	Yes		
338	The solution has the ability to post (import) values from a Utility value file from the State.	Yes		Vision has the ability to import this file and is compliant with current DOT requirements. In addition, Vision is working with DOT to generate a report that eliminates the need for the import. Pricing for additional imports can be provided during the contracting process or executed during implementation as a Change Order when the specific source, fields and formats are scoped.
339	The solution provides an automated mechanism that allows the user with minimal manual data entry to calculate the appropriate railroad mileage percentages, assign account numbers by property owner and tax code		Custom	These features are not included in the proposal. Pricing for this specific process can be provided during the contracting process or executed during implementation as a Change





	areas, verify total assessed values by property owner and tax code area, and update the solution.		Order when the specific requirements, sources, fields, and formats are scoped.
340	The solution provides an API to allow 3rd party software to query, view, and update the solution's database.	Yes	Vision only allows certain partners to query or view our database. For security purposes and data quality issues, updates to the Vision database are limited to a very select list of Preferred Partners.
341	The solution has a test environment for training and testing. The test environment will function in the same manner as the production database and will allow employees to perform testing activities for training and cross-check purposes.	Yes	Vision has both a Training/Testing environment as well as a Sales Analysis module that is synched to the live production environment and provides a Sandbox environment for Assessment value analysis purposes. Vision has included both the Live Environment (with Sales Analysis) as well as a full Test/Training environment (With Sales Analysis)

Vision reserves the right to clarify and understand the matrix requirements more fully during the demonstration process. Vision is proposing Commercial Off-the-Shelf Vision 8 for this project, without modification. We have, to the best of our ability, answered the matrix questions in relation to COTS Vision 8. As part of this proposal, Vision is also including the standard Building Permit import and a custom Tax system extract. Additional imports / exports would be billed as scoped. Vision 8 is a highly configurable platform, and we are confident it can accomplish the vast majority of functional requirements indicated above, with the help of further business process analysis.



Overview of Vision CAMA Capabilities

Vision is proposing our state-of-the-art Commercial-Off-the-Shelf *Vision CAMA* platform to be implemented in the City. Vision is currently live and implemented in over 430 communities nationwide. Below is a detailed description of the *Vision CAMA* capabilities.

The Table Stakes:

- Vision CAMA is fully compliant with USPAP and IAAO standards
- Vision CAMA is compliant with all applicable Virginia statutes and regulations
- Vision CAMA includes any legislative or regulatory updates in Virginia as an included component of our annual support agreement at no additional cost
- Vision CAMA is a Microsoft SQL based platform and can be deployed on premise or cloud hosted through Vision, if preferable
- Vision is used by more than 450 communities across the United States, including the nation's capital (Washington, DC) and the largest city in the country (New York City)
- Vision CAMA includes robust Assessment Administration and Valuation capabilities, designed to cover the needs of both administrative users and appraisers

Below, we have highlighted a few key themes of *Vision CAMA*. Below that, we have enclosed a detailed feature overview for additional information.

Accomplish Your Work Faster

Vision CAMA is designed to reduce the number of steps required at every step of the Assessment process. Highlights include:

- Enable each user to customize their pathway through the application by enabling users to build personal workflow dashboards to manage frequent tasks (e.g., exemptions)
- Improve taxpayer communication by sending and tracking mail merges using community-specific notice templates, while automatically associating the notice to the parcel's documents, updating reportable notice history, and tracking responses with delinquency flagging
- Democratize access to data with an easy-to-use reporting module designed to empower the entire user base
- Reduce the impact of data entry with the ability to mass update
- Track and manage appeals directly in the application
- Allocate and track visit assignments
- Reduce time to sketch parcels with pre-built stamps for difficult but commonly used shapes
- Expedite the time to create new parcels with the ability to copy over all details from a parent parcel as well as tools for subdivision creation & management
- Reduce data errors and lower the training threshold with the ability to hide, require, or display any screen or field for any user permission group

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- Automatically import building permit data with the built-in building permit import tool
- Reduce the number of data entry errors at the point of entry using built-in data integrity checks

Provide Extraordinary Service to Taxpayers

We all serve the public. That's why *Vision CAMA* is enabled with features designed to support the ease and accessibility of taxpayers' interaction with the assessment process:

- Demonstrate valuation transparency with instantaneous valuation worksheets that show every calculation involved in valuing the land or building on any parcel
- Increase options to assess each parcel differently with the choice of a cost, market analysis, comparable sales, or trending assessment
- Answer taxpayer questions on the fly by using our configurable easy-access parcel data header bar
- Disseminate valuation information with a taxpayer website designed for accessibility and transparency, including:
 - Display of GIS maps, Property Record Cards, sketch, imagery, and parcel data to support valuation
 - Full configurability to display your community's seal, messaging, and associated online resources, including enabling and disabling any CAMA field
 - The ability for taxpayers to submit suggested data changes for their properties online
 - Suppression and non-disclosure flags for sensitive or protected taxpayers
- Never again wonder why a piece of data changed when a taxpayer asks about value.
 Capture every database change in the detailed parcel audit, including changes to valuation tables and sketch adjustments, and prompt users to input trackable and reportable 'reason for change' notes for any adjustments that affect value.
- Easily differentiate between improvements and adjustments with the track changes feature while completing data entry
- Allow for unlimited images to be captured for each parcel
- Configure multiple Property Record card templates directly through the application, enabling easy information dissemination for varying purposes, e.g.: field visit cards for internal use vs. 'Property 101' cards for taxpayer use; commercial vs. residential cards, etc.

Improve Valuation Accuracy and Precision

Vision's valuation tools are designed to enable expert appraiser's ultimate flexibility to use any method of valuation, supported with robust data and analysis. Highlights include:

• Precisely calibrate your valuation models and proactively manage data outliers through an unparalleled Sales Analysis module. This module is designed to enable valuation users

to test IAAO-approved statistics such as COD, PRB, PRD, and dozens of others against a 'what if database'

- Support your values with a customizable comps algorithm that displays up to five comps that is designed to provide imagery, mapping, and comparable sales data unique to your community
- Ensure no sales are lost due to improvements during same year of sale with the comp sales "snapshot".
- Eliminate overrides with infinitely customizable tables and cost models, including dozens of fields that can drive value factors specific to your community (ex: by body of water)
- Empower leadership and appraisal teams to make table and cost model updates through the User Interface without custom development
- Handle commercial valuation with ease using a detailed income module to capture and analyze both actual and market income data for commercial properties
- Easily manage condo valuation with our specialized condo valuation tools
- Improve strategies for collecting new sale information with unlimited owners associated with a parcel and a screen to view all previous owners of a parcel
- Ensure no outbuildings are improperly valued with the table-driven outbuilding screen
- Never again worry about parcels being deleted with parcels not being used set to inactive rather than being deleted forever

Achieve Dramatic Efficiencies with Desktop Review

Vision CAMA is specifically designed to reduce the burden of site visits by maximizing impact from the desktop, with a User Interface that combines:

- A GIS-first user experience that is bidirectionally integrated with CAMA data as well as the report writer module and Sales Analysis tool
- Aerial and street-level imagery such as EagleView
- Integration with geolocated services such as Google Maps, local GIS services, etc.
- Associated documents, such as deeds, notices, floorplans, income & expense data, etc.
- Sketch information
- Building and land photos stored in the application which are taken from a mobile device
- Parcel data from CAMA
- Use of dashboards to combine different screen for easier data entry

Integration with Other Software Products

Vision CAMA is more than a CAMA platform; it's an entry point into the constellation of technology-enabled valuation applications. Vision CAMA natively integrates with ArcGIS, Aerial imagery such as EagleView, Google Maps, Microsoft Word, Microsoft Excel/PowerPoint, building permit software, and, of course, your tax administration, billing, and collections software. Vision also has a strong partnership with **Data Cloud Solutions**, YOUR current mobile field data collection platform.

Vision CAMA Summary

Vision CAMA is a full-featured CAMA platform in use by more than 430 communities across the United States, counting as small as 250 parcels and as large as 1.2 million parcels.

Our deep investment in Vision CAMA is demonstrated by the level of satisfaction reported by our users, a few highlights of which are enclosed in this proposal.

Below, we share a brief review of some critical Vision CAMA features. We would be grateful for the opportunity to demonstrate these features and more in a demo with your team.

Working the Way You Want to Work: Flexibility and Configurability

- o Example Feature: The Administrative Module
- o Example Feature: My Screen Dashboards
- o Example Feature: Getting Data into the System Quickly: Sample Building Permit Import

Capturing an Accurate Property Database

- o Example Feature: Parcel Information and Property Records
- o Example Feature: Ownership Information
- o Example Feature: Utilities for Parcel Administration
- Example Feature: Sketching Capabilities
- Example Feature: Document and Image Management
- Example Feature: Capturing and Maintaining Historical and Future Year Data

Generating Insights from the Data (Desktop Review):

- o Example Feature: GIS Integration
- o Example Feature: Aerial Imagery Integration
- o Example Feature: Visit Management
- Example Feature: Report Writing

Accurately Valuing Properties:

- Example Feature: IAAO Approaches to Value (Cost, Market, Income, Trending, etc.)
- o Example Feature: Exemptions and Value Reductions
- Example Feature: Table Maintenance and Cost Modeling
- o Example Feature: Statistical Analysis and "What If" Tools ("Sales Analysis")

Communicating with the Public and Defending Values:

o Example Feature: Valuation Worksheets for Land & Building Valuation

"I've always said Vision is the Cadillac of CAMA systems."

Assessor Millis, MA

- Example Feature: Comparable Sales
- o Example Feature: Property Record Card Editing
- o Example Feature: Mail Merges and Correspondence Management
- o Example Feature: Vision Web Portal
- o Example Feature: The Appeals Module

"From the technology perspective, we felt very strongly that the model we had designed within Vision and the flexibility of the tools at our disposal would fit the bill.

Demonstrating how we use the Vision 8 platform with features like GIS and Pictometry to deliver accurate assessments was a vital component in meeting the international standards set by the IAAO. By completing this challenge, we were able to receive validation from an independent source on what we were doing right, as well as identify certain areas of our business practices that we can improve on in the future.

It's been very helpful in allowing us to create a road map for future improvements that may include additional technology like the mobile solution offered by Vision through their partnership with Data Cloud Solutions."

Chief Appraiser for the Office of Tax and Revenue's Real Property Tax
 Administration
 District of Columbia

GOVERNMENT SOLUTIONS

Working the Way You Want to Work: Flexibility and Configurability

Configurability and flexibility are at the core of Vision CAMA. Vision users love that they can customize the look and feel of the application through the User Interface, without having to wait or pay for costly and risky custom software development.

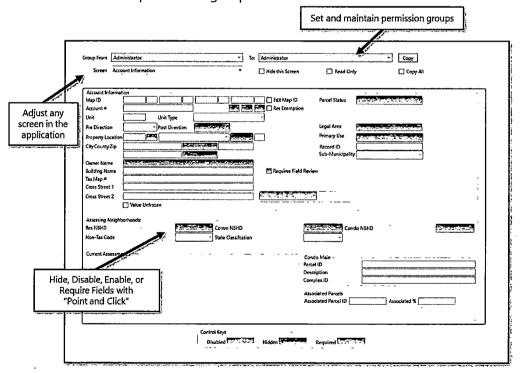
Document 1-2

With the built-in and user-friendly Admin Module, the power of configuration is put into the hands of users, who can configure nearly any component of the application, including screen order, screen layout, field names, data types, tool tips, and much more.

Not only does this enable users to **work the way they want to work**, but it also **dramatically reduces our project implementation and support time.** It also enables each customer to benefit from system enhancements made for every other Vision customer, while still deploying personalized software configurations unique to each community.

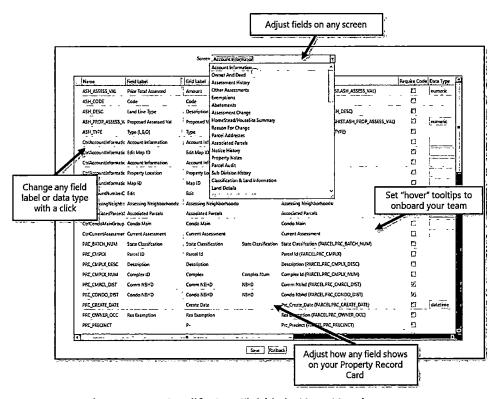
To illustrate the configurability of Vision, we have selected a few feature highlights below:

• See What You Want, Hide What You Don't: Reduce data entry mistakes and onboarding time for new team members by hiding, enabling, or disabling any field or screen for various user permission groups



Point and Click Screen Editor

Work in Your Language: Use your community's language by renaming any field and adjusting picklist values

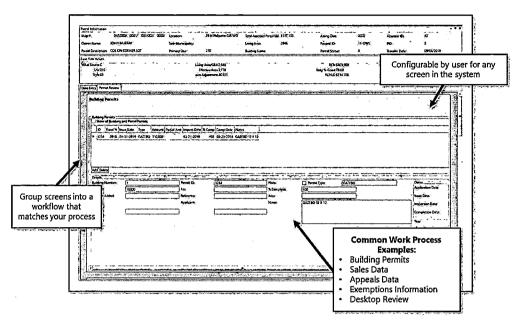


The Power to Modify Any Field is in Your Hands

- Reduce Data Entry Errors with data entry 'bumper lanes' such as required fields, spellcheck, picklist configuration, min/max warnings, positive/negative checks, etc. Each of these are configured to your community.
- Improve Your Workflow Efficiency: Create customizable user-specific User Panels to enable users to work the way they want (ex: building permit review) and decrease data entry time by tabbing through each field

"The Vision software is very user friendly. A great software database"

Assessor Bristol, CT



Document 1-2

Configure Personalized Work Processes using User Panels

In addition, parcels can be assigned to individual Appraisers, who can then run reports of "work lists" to identify parcels in their jurisdiction that need to be inspected. The Appraiser ID can be assigned globally via Mass Update or manually one parcel at a time. When a new appraiser is assigned to a parcel, the prior appraiser can be captured as historical data.

- **Reduce Onboarding Time** with customizable 'tool-tips' to guide users through the application
- Build Your Taxpayer's Experience with a customizable website, Property Record Card Editor, comparable sales snapshot, and more (additional details below)
- **Enable Your Valuation Approach:** Choose the valuation factors specific to your approach to value (for example, names of specific water bodies) and apply those factors with fine-tuned precision (ex: traffic adjustment to adjust value upwards for commercial properties and downward for residential). Additional details on valuation flexibility are included below.
- Add Data into the System Quickly and Efficiently: Use our Standard Building Permit
 Import or create an import unique to your community to enter data in a systemized and
 automated way.



Capturing and Maintaining an Accurate Property Database

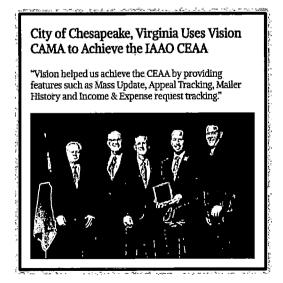
Parcel Information: Property Records, Attributes, and Classifications

The flexibility of *Vision CAMA* enables each municipality to define the property attributes it wishes to capture. Each database is unique, which is why during the conversion phase we partner with each municipality to determine where their legacy data would best fit in Vision. We then move data attributes from the legacy system into the applicable fields in *Vision CAMA*.

Vision is highly configurable, and after the detailed data mapping and conversion, each community can use the Administrative Module to expose additional fields to capture information that was not available in the legacy system. Users are also able to suppress any fields or attributes that are not applicable to the municipality. Those attributes can also be repurposed and configured to meet any additional needs of the community. The property attributes can be tied to a model with value or they can be used for descriptive purposes only.

Vision provides a natural logic for capturing land, building, and income information about any property. This includes, among many other pieces of information:

- Building Information such as style, model, grade, and dozens of other customizable fields
- Building Permits, including type, percent complete, and application / inspection date
- Land Line Information, including property factors such as utility access, waterfront access, etc., all of which can be used to drive value. Unlimited land lines can be associated with any parcel, and each land line can host unlimited "current use" codes and calculations, which are table-driven. The calculation can be a flat dollar amount or a % of assessed value for the land area that the "Current Use" is tied to.
- Depreciation Schedules
- And much more...



"Our Vision CAMA solution helped us achieve the CEAA by providing features such as Mass Update, Appeal Tracking, Mailer History and Income & Expense request tracking. We utilized the real-time GIS and Report features to assure our data was accurate. By utilizing the features of the Vision CAMA solution, we were able to assure accurate and equitable assessments."

Assessor, City of Chesapeake, VA

GOVERNMENT SOLUTIONS



Vision features many robust Assessment Administration tools, including unlimited property transfer information, mailing address data, current and previous assessment information, and an electronic tax roll export.

Ownership Information

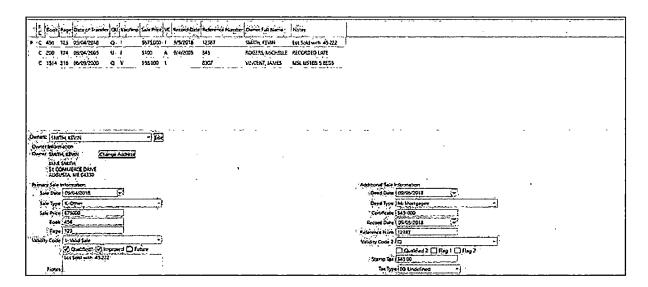
"I chose Vision because I'm a very visual person. I liked the way that the system is designed and look forward to using it. I also like the people!"

Chief Assessor Huntingdon County, PA The Vision Owner and Deed module allows users to manually enter Sales or import them through a sales import. Like all modules in the application, the fields on this screen are configurable and any field can be hidden or repurposed to better suit the data being captured field.

The system allows for unlimited owners to be associated to any parcel, capturing the owner(s) and corresponding mailing address for each owner as well as % ownership. Owners can be assigned more than one mailing address, a Primary and Secondary, which works well for citizens that spend part of the year at one address and relocate for part of the year to another address. The Owner Maintenance console allows users to

associate one owner with many parcels (if desired), allowing users to update critical contact information such as addresses, in a single place.

The Multi Parcel Sale Manager tool will batch insert a sales line on selected parcels allowing the user to allocate the sales price on each parcel. When new sales are added or inserted the application will retain the prior transaction, allowing the users to maintain a "Chain of Title" in Vision CAMA.



Sample Owner and Deed Screen

Utilities for Parcel Administration

Vision CAMA includes several built-in utilities designed to enable parcel administration. These include:

- **Create Vacant Parcels** allows the users to create parcels quickly and easily in batch for subdivisions/condo complexes etc. The parcel's genealogy is then recorded on the "Subdivision History Screen".
- **Copy Parcels** allows the users to copy user selected data from one parcel to others, this is a great timesaver for subdivisions and condos.
- Move Buildings is a great utility for when a parcel is merged with another or when a
 parcel is split and the existing building is moved to another parcel. Move building will
 move the building from current parcel to desired parcel.
- **Copy Exemptions** allows the users to roll the personal exemptions forward from one year to the next without having to manually key the exemptions in each year.
- Make all Future Parcels Active creating future parcels allows the user to work in the current year database creating parcels for a future year. All future year parcels can be made active at appropriate times using the utility "Make all future parcels active".
- Save Assessment History creates a snapshot of land, building and total values with a
 Save assessment history. These saves can be your interim values or your final values.
 Vision has a built-in utility to delete the unwanted saves.
- Mass Update allows users with the proper credentials to update parcels in batch. The
 user defines the parcels to mass update via a query or selecting the parcels on the GIS
 Map. Users can insert/update property notes, notice history, and visit history. Users with
 advanced mass update credentials can change value related fields in batch (example:
 Users can select a group of parcels on the GIS map and change neighborhood, or
 change the condition codes) in the database
- Generate mailing labels
- And much more...

Sketching Capabilities

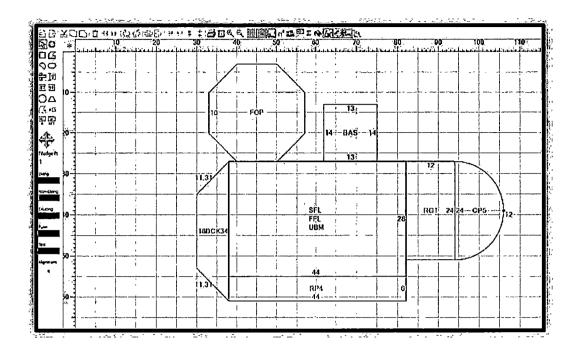
Vision 8's native sketch module is widely considered to be the best in the industry and is specially designed to reduce sketch time and improve valuation accuracy. Vision Sketch is a mouse-driven application, allowing the user to easily draw the footprint of any building. Vision sketch drives value through square footage and designated subareas, which are correlated to configurable values in the underlying Vision tables. Numerous sketch features are included natively, such as shape splitting, rotation, easy-polygon tools, octagon and bay window stamps, nudge, labeling, export, and much more. Below are a few highlights:

- Quickly Draw Any Building: Quickly draw complex polygons, toggling between right
 angles or all angle types, while displaying the degree of any angle while drawing. Toggle
 to use whole numbers or inch increments when drawing dimensions.
- Add Additions with a Click: Add rectangular or arc-based additions with a simple click, affiliating new square footage to a designated subarea.
- **Built-In Stamps for Difficult-to-Draw Structures:** Use easily configurable stamps to easily sketch difficult-to-draw shapes such as octagons and trapezoids (e.g., gazebos and bay windows).
- **Modify Shapes Easily;** Modify entire sides of a shape or segments of a line, or split shapes with a click.
- **Repeat Sketches with a Click:** Easily flip or rotate buildings or sections to accommodate repetitive properties like condo complexes or apartment buildings. Copy or export sketches from parcel to parcel, to provide a template for each new sketch, in .xml or .jpg format. Copy sections of a sketch within a parcel to repeat.
- Easily Add or Subtract Square Footage: Manually enter square footage of an area without sketching the footprint, while still assigning the use of the area for proper valuation. Easily subtract square footage for difficult-to-sketch areas such as atriums.
- **Unlimited building sketches on a parcel**, especially valuable for complex commercial properties or large agricultural properties with multiple outbuildings (ex: barns or siloes)
- **Effectively Label the Sketch for Easy Viewing:** Add labels, choose the size and color of font for area codes and text, and detach labels from the sketch for easy viewing.
- **Easily correct errors** with the undo tool
- **Display the distance** between two points with the ruler tool (e.g., between a detached garage and a main building), reducing your time within the sketch by not having to calculate square footage.

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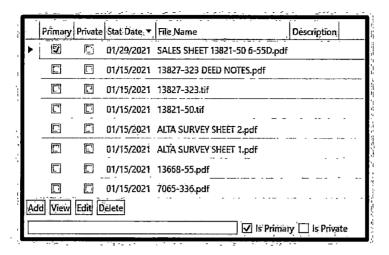
Mouse-Driven Sketch with Built-In Efficiency Tools

Document and Image Management

Vision CAMA provides a robust document and photo management system. Vision offers users the ability to associate any type of electronic document with a parcel or an owner. Documents can be saved either to the Vision database or to a linked file share on the server. Sensitive documents can be set to "Private," such that only users with access rights to view private documents have read access. Vision supports unlimited file attachments, including documents such as scanned deeds, Word documents, sent notices, copies of email correspondence, still photos, and movie / video files.

Vision also offers a Mail Merge tool, which allows users to batch associate completed mail merge documents to each parcel.

GOVERNMENT SOLUTIONS



Example Associated Documents

Vision also provides built-in tools to store images taken in the field, including a built-in photo viewer which has panning and zooming capabilities.

In addition to images of the parcel, Vision can also bring the parcel to you by leveraging many of the commercially available imagery viewing products from Google Maps (aerial and street level imagery), Microsoft Bing, and EagleView / Pictometry. Additional information on the application of these tools to Desktop Review is provided below.



Image Zoom Tools

GOVERNMENT SOLUTIONS



Current and Future Year Data

Current and future year data can be worked on simultaneously; no need to wait to work on next year's roll until the current year is closed. New parcels for future tax rolls are added to the current database as future parcels. A utility is available to move future parcels to current year when you are ready. For modifications to current parcels, a flag is set that allows the user to update the parcel data without affecting the current year value; the value updates will be tagged as a Proposed Value.

At end of year processing a snapshot of the database is captured to archive all parcel data including but not limited to sketches, land data, and building attributes. Additionally, all the rate files and models that were used for valuation for that year are archived as well. All this archived data is still available by simply selecting the year you wish to view.

Supplementals and Abatements

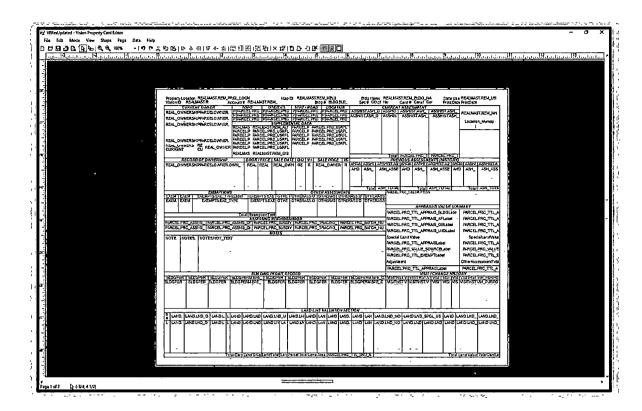
Supplementals and abatements are available to capture changes to a property that occur midyear, such as new construction or calamity. These adjustments are handled by inputting the effective date of the change, and the business rules will calculate the supplemental value based on rules specified for that time frame. These time frames can be customized to daily, monthly, quarterly or on a semi-annual basis. This works for prior year adjustments and current. A reason code is utilized to enhance reporting capabilities to track specific reasons why values were adjusted. Supplementals can be processed individually or as a batch change. These changes are displayed on the Assessment History screen for easy reference.

An enhancement is scheduled for the 1st quarter of 2022 that will provide more automation to this process. The user will make a change one time on a prior year assessment, inputting the effective date and the reason for the change, and it will then utilize the business rules to propagate that change across multiple years. This enables the user to only change property data in the years the data actually changed, but to review and automatically make assessment corrections to all affected tax years.

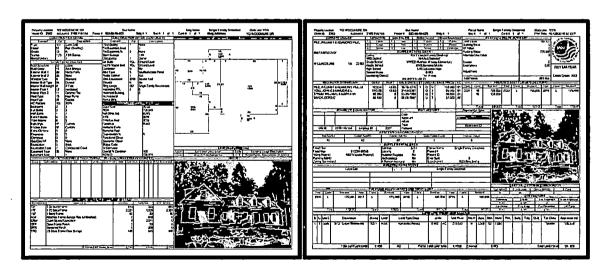
Customizing the Property Record Card

The Vision Property Record Card Editor enables the user to generate unlimited card templates for different uses (for instance, field review vs. taxpayer-facing; commercial vs. residential vs. condo).

The Card Editor is highly configurable and is designed to enable communities to provide transparent, accurate valuation information to their taxpayers. Communities can customize the fields that are displayed, the layout of fields, the placement and number of images / sketches, the community seal, descriptive text information, color palette, font, and much more.



Vision Property Record Card Editor: Design your own Property Record Card



Example Customized Property Record Card



Generating Insights from the Data (Desktop Review)

Vision CAMA is built to reduce time spent in the field and enable high-quality Desktop Review. To that end, Vision CAMA enables the user to compare field-based information to sketch, photos, aerial and street-level imagery (both public and proprietary), and GIS layers. GIS and aerial imagery can be detached from the CAMA application to enable Desktop Review across multiple monitors.

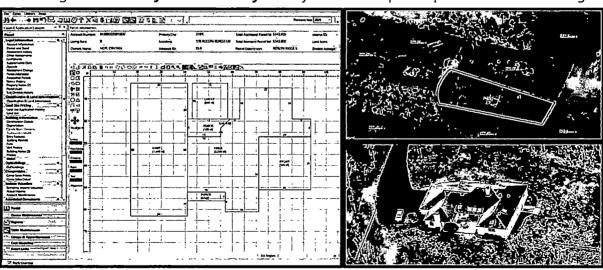


Multiple Monitor Desktop Review

GIS and Aerial / Street-Level Imagery Integration

Our profession is a spatial one. That's why Vision 8 is built around spatial visualization and mapping. Its deeply integrated GIS capabilities enable Assessment Teams to:

- Generate **abutter lists** with a click
- Democratize data analysis by easily displaying a set of parcels that meet any database criteria on the GIS map
- Answer assessment inquiries on the fly by building colorcoded thematic maps
 - e.g. 'show me all my neighborhoods by color,' 'show me all the condos that sold over \$250,000 in the last three years,' 'show me all the parcels I'm responsible for visiting by grade,' or 'show me all the fast food establishments in the a given area.'
- Develop strong appeals support materials by displaying and labeling comparable sales on the map
- Identify valuation outliers by visualizing Sales Analysis results
 - o e.g., by displaying IAAO-approved stats on GIS
- Keep the database accurate by mass updating directly from GIS
 - o e.g., with grade or external obsolescence
- Log **notice history or visit history** directly from the map to improve workflow tracking



Example Desktop Review w/ Aerial Imagery from Salem City, Virginia

"I love Vision and using it here in my office in Hartford, VT because I have integrated maps at my fingertips. More importantly, I always feel like the customer really comes first with Vision and that's what truly makes the difference."

Assessor Hartford, VT Document 1-2

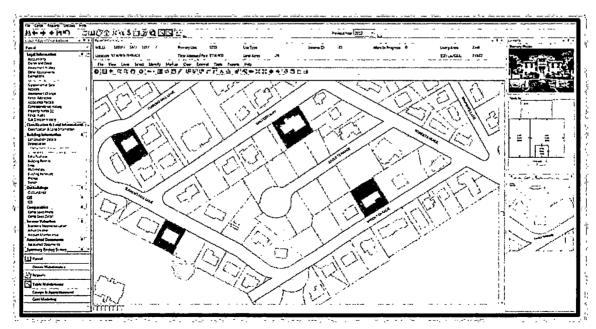
VISIONGOVERNMENT SOLUTIONS



The Vision GIS module uses ESRI's ArcGIS technologies and is integrated into nearly every element of the CAMA platform, from Sales Analysis to Reporting to Comparable Sales. Users can create reports in the Vision Report Writer and send the data to the Vision GIS module for viewing. Additionally, subsets can be created in the GIS module and sent to the CAMA report module. The GIS module can also be used to mass update database information. The software also supports personal geodatabases.

"I've been the GIS administrator here in South Kingstown for the past 22 years, and work closely with our Assessor Department in accessing the Vision attributes to link with the Town's GIS database. With the help of the Town's IT staff and your 2 very skilled, friendly, and extremely knowledgeable and helpful software support engineers, AJ Serrano and Dylan DiGeronimo I can successfully download all the necessary and valuable Vision attributes. What a delight it was to work with these 2 gentlemen, and while it took several iterations, they had support of other Vision staff and were extremely patient, knowledgeable, professional and responsive. I applaud them for their fine work and congratulate Vision for employing such fine and technically proficient customer support staff."

GIS Administrator South Kingstown, RI



Sample GIS Screen



Visit Management

Track all Visit/Inspections to a parcel in Visit History. The visits can be independently added to each parcel or the user can select a group of user defined parcels to be updated in batch (via Vision Mass Update) with Visit history information. Capturing this information will allow the users to build workflows for properties requiring visits. Queries can be written to identify properties that have or have not had a visit. This data can then be graphically displaced on the GIS Map.

Ad Hoc Reporting

Vision CAMA includes an integrated business intelligence style report writer and query function to allow direct and userfriendly access to the database. The Report Writer has an easy-to-use front-end design, which allows users to create their own On-Demand reports or to pull from our Vision standard report library.

The Vision Report Writer enables users to meet external and internal management reporting requirements, track workflows, and execute ad hoc queries and reports. Reports can be used to query **any field** in the database, create **thematic maps** in GIS, and perform mass data updates with simple, intuitive tools that have the same look and feel as the CAMA system Reports can be saved and exported across team members or communities for re-use.

As users build each report, they can preview the data and the format to ensure each report meets their requirements. Users can also design and save report templates to capture

"We've now been live on Vision 8 for a few months now and we're very happy to see the same level of stability and reliability in 8 that we saw in 6. In other words, 6 was like an old Windows XP product, and 8 is functioning a lot more like the latest version of Windows 10."

Chief Assessor Crawford County, PA

commonly-used information such as legal data and account information, parcel information, audit information and attribute information.

Vision reports can be saved and exported as PDF, Excel, flat file formats, and XML documents, which can be attached to any email. Reports can be printed on any printer connected to the Windows desktop operating system, including networked printers. On-demand reports can be attached to the parcel record as an associated document for longer-term storage and viewing.

In addition to the on-demand reporting described above, Vision also includes a number of standard pre-created reports, which can be run at any time with user-defined parameters. Below is a sample set of Vision standard reports.

Standard Reports within Vision CAMA (Sample List)

Parcel Lists

- Sales Report
- Sales Review
- Old to New 0
- Classification Check by State Use
- Totals Data Check by Property Type & State Use
- Mixed Use Special Use Properties

Analysis Reports

- Res/Com Review
- Land Valuation Review
- Condo Review
- Vacant Land Sales Spreadsheet
- Com/Ind Sales Land Residual
- Multi-Fam/Apt Sales Land Residual
- **Unsold Property Test**
- Price Related Differential

Rate Files

- Land Curve
- **Building and Land Rates**

Income Reports

- Actual Income Spreadsheet
- **Actual Vacancy Spreadsheet**
- **Actual Expense Spreadsheet**
- **Extracted Cap Rate**
- Economic Income Spreadsheet

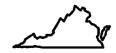
- Income/Cost Comparison
- Market Rent Schedule
- **Capitalization Rates**
- Adjustment Rates
- Income Land Residual
- Income Detail Review
- Cost/Income Detail Report

In addition to reporting on the data in the system, Vision also offers the ability to mass update single or multiple fields in the database. This enables permissioned users to quickly and efficiently assign parcels to staff members, update assessment administration information, or log visit or notice histories. This tool has special "quick insert" capabilities to insert notices or property visits. The Mass Update can be accessed either as a standard utility or can be completed directly through the GIS application.

Together, these features enable municipalities to reduce the number of site visits, proactively identify property improvements or changes, and dramatically improve valuation accuracy.

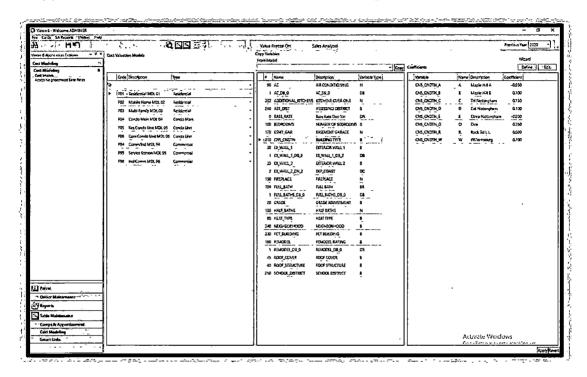
Visit History Summary								
PtO	MBLU	Address	Land Use Code	Date Of Visit	Initials Of DC	Visit Code	Provious Assessed Value	Current Assessed Value
6	V VB//	Location: 16 HEJIRYS WAY City. State: Zip.	9010	03/14/2016	DM	00 Mazsur+Listed	81400	9140
7	V VC//	Location: 35 HEDRYS WAY City. State Zip:	9010	03/14/2016	LV4	00 : Reasur+Listed	115200	11520
24	1/9·D//	Location: 13 PEACEFUL PLACE Cay. State. Zip:	1010	06/13/2018	LJJ.	00 : Mezaur+Lested	137300	13730
21	1/9/0//	Location, 14 PEACEFUL PLACE City State: Zip.	1010	05/16/2017	LM	00 : Measur+Listed	137300	13730
24	V 50//	Location: 14 PEACEFUL PLACE Cay: State Zip:	1010	04/25/2016	æ	01 : Mazeur+ (Vise	137300	13730
30	3/11///	Location: 157 MIDDLE ROAD City. State: Zip	1010	08/29/2017	LM	00 ; Measur+Listed	146100	14540

Ad Hoc Report Writer



Accurately Valuing Properties

IAAO Approaches to Value (Cost, Market, Income, Trending, etc.).



Document 1-2

Vision CAMA supports several approaches to value (Cost [Including Marshall & Swift Commercial

Data], Market, Income, Condo Value Apportionment, Trending and Z Contour for land), allowing the Users to construct customized valuables within the valuation models.

The Assessment Summary screen provides an easy dashboard for reviewing every approach to value that you would like to enable in the CAMA system. This enables the appraiser to compare approaches to value in a single place and select a value source for each parcel. In this screen, you can also capture detailed Assessment History information.

Vision also contains a full-featured income valuation module, allowing the user to capture both actual and market income data for valuing all the appropriate commercial, industrial, and apartment properties within a jurisdiction. Vision enables the user to incorporate

"The system itself is userfriendly. I really like the new growth tracking feature that comes in handy at the end of the year. I know my Project Manager was working with multiple clients at the time but she provided really personalized service. I felt like I was the only one she was working with."

Assistant Assessor Westhampton, MA Many Vision CAMA municipalities are using Marshall and Swift data for cost valuation of commercial properties using the Vision Marshall & Swift module. Vision CAMA users are responsible for procuring the Marshall and Swift data from CoreLogic.

Exemptions and Value Reductions

The Vision exemptions screen is designed to capture personal exemptions. Typically, exemptions are applied based on the property owner, and users can enable a setting that will flag the user of an existing exemption when adding a sales line. As an option, the exemption total(s) can be subtracted from the parcel total. Users can capture a table-driven exemption code, description and amount (flat dollar amount), fields such as start date and end data allows users to indicate the start and the expiration date of the exemptions. Additional user defined fields can be opened to capture additional Exemption information. Vision has standard reports to identify parcels with Exemptions.

Utilizing the Vision Mail Merge functionality, "Mail Merge" fields from the Exemption Screen can be merged onto a document. This is especially useful when sending out Exemption Renewals.

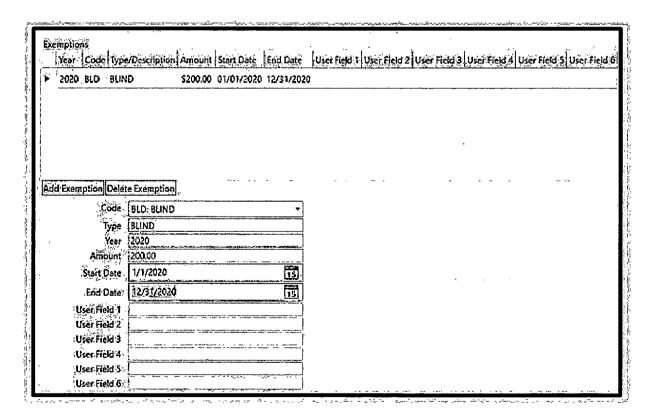


Table Maintenance and Cost Modeling

Produce fair and equitable values for your community. Reduce the number of appeals you receive and win the ones you do.

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- Puts the power of valuation in the hands of the assessor.
- Our multiple approaches to value (cost, market, income, trending and more) reconcile and defend your final approach to value.
- Cost Modeling Wizard build your own cost models to develop rate factors and adjusts to fit your market.
- With flexible cost modeling you decide which attributes to include and how to apply them, enabling complete control over your models and values.
- Visually display your sales analysis stats on the GIS map to easily highlight outliers.
- Complete autonomy over your comp sales module attributes. Use any component of the parcel in your comp sales model to safeguard your values.
- Track your appeals history to easily manage your appeals process.

Statistical Analysis and "What If" Tools

The Vision Sales Analysis tool was built by our Appraisal Services team, using their 45 consecutive years of revaluation experience. This powerful "what if" database enables Assessing Departments to test and calibrate their valuation models (and find data outliers) in a safe environment before rolling changes over into the Production Database.

Utilize sales analysis tools for "what-if" scenarios. Make model and table changes in your sandbox environment to run analysis reports and test your models without impacting your live data until you are ready.

First, this module enables the user to pull in sales that meet user-defined criteria such as years and sales qualification. The module then auto-generates more than two dozen **IAAO-approved statistics** to analyze the sales in the database, including Assess-to-Sale Ratio, COD, PRB, PRD, and many others.

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"Our upgrade to Vision 8 was great, and everything was pretty seamless. Vision has always been a robust system. It's got a lot of bells and whistles without being too frilly and it's a reasonable price for a locality. It also merges well with our financial software."

Commissioner of the Revenue City of Martinsville, VA Users can then easily stratify sale properties by criteria such as style, stratum, land use, neighborhood, condo complex and many others.

The sales analysis module allows for analysis on stratification of sale property types captured in the system. Running ratio studies in Vision sales analysis to determine the level of assessment by property class is quick and easy. The ability to sort by any statistic makes for a quick review of identifying outliers.



Communicating with the Public and Defending Values

Vision CAMA is built to transparently communicate property values to taxpayers and effectively defend those values in formal and informal hearings.

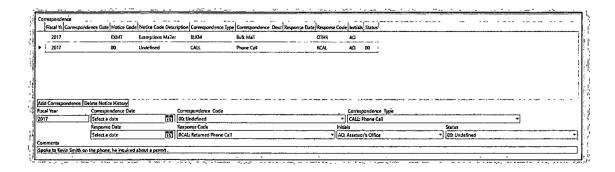
In one recent webinar titled "Appeals - How to Have Less and Win More," a Vision user shared that his informal appeals reduced from 1,500 per year to 0 after implementing Vision CAMA. This is a testament to the easy-to-explain and transparent valuation engine. There are no black boxes in Vision!

A few key points below

- Easily-explainable valuation worksheets, which detail every calculation in the application.
- Tools to Explain Values to Taxpayers
 - o Comparable sales, customizable to your community
 - Show comp sales snapshot
- Communicate Transparently with Taxpayers Property Record Card editing + website (put in comment to refer to pre-built Web Hosting language in SharePoint)
- Generate and Manage Your Correspondence with Taxpayers
 - Mail Merges
 - Correspondence Management
 - Visit History don't visit the same property twice

Data from the Vision CAMA application can be merged onto documents through the Vision report writer. Surveys such as Sales Verification Forms and Data Mailers are frequently created with this utility.

All correspondences can be captured on Correspondence History screen. Using a table-driven user defined picklist, the user can select a correspondence code and type, fields for correspondence date, response, and comments are also available. User can add correspondences manually to one parcel at a time, or in batch utilizing the Vision Mass Update Utility.



Example Correspondence Information

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• Appeals and Grievance Tracking

The Appeals and Grievance screen can be configured to capture, organize, and manage appeals. Important data such as Application Date, Inspection Time/Date, Deadline Dates, Hearing Time/Date, Appeal status, Reason Codes, and more can be captured on a parcel level. Additionally, reports can be generated off of any and all these fields to build into your workflow, viewed on the GIS map, or print property record cards, or exported to excel.



Overview of Vision 8 Security

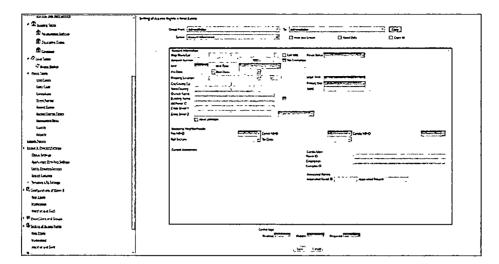
The Vision CAMA system includes a number of robust security features:

Password-Protected User and Administrative Access: The system functions in Vision 8 such as inquire, update, add and delete are controlled by a user identification code and password. The user can change their password online. Security also applies to all files and tables. Integration with Windows domain security is provided.

The application client includes a comprehensive application management user interface that controls all system metadata including configuration setting, users, groups, permissions, security, information hiding.

- Password Policy Settings: The Vision 8 system allows for Password Policy settings, such as:
 - Complexity Settings, allowing the administrator to require a minimum number of characters and specific types of characters (alpha, numeric, special)
 - o Password Life / History Settings: optionally require users to change passwords at a certain cadence, and prevent users from re-using old passwords
 - **User Lock Settings** for sequential failed log-in attempts
- Robust User Permissioning and Access Control: Various user login levels can be established to define a set of user permissions, which control access to screens, fields and tables. The administrator can set user access to screens or to specific fields. Within each screen and field, the administrator can set "edit", "read only" or "disabled" permissions. The disabled field will remove the field from the user's view.

In addition to user level access rights, there are multiple levels of administrator access rights. Some of the permissioning levels include the ability to change other's user permissions, and/or the ability to change security level permissions. An example is the IT department can have the permissions to change and monitor security access, but not have the ability to change data within the application.



Sample Screenshot: Vision Admin Module

- Comprehensive Audit Trail: The Vision Audit trail captures every change made to the database by any user. The administrator can utilize this feature to track every aspect of the system. If desired, the system can report every incident of data manipulation, including the ID of the user who made the change and the date/time of the modification. This includes modifications to parcel data as well as table changes.
- Inactivity Timeout: Vision CAMA has an inactivity time-out setting, which allows the Administrator to set the number of inactive minutes before Vision 8 requires a password for re-entry. The time-out length is a database setting that applies to all users.

Vision will work closely with your team and with your community's IT during postimplementation training to configure and set-up security features, in accordance with your organization structure and community controls.

We understand that some communities may prefer an on-premise deployment, while others prefer to use Vision Cloud. For those interested in Vision Cloud, we have included a separate security overview of our cloud data center in the technical section of this proposal.

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Vision CAMA Technical Overview

Application Architecture

Vision CAMA has been developed for use with the SQL Server database architecture, currently SQL Server 2016 - 2019. *Vision CAMA*, like all CAMA applications, is both a data and computation bound application and, as such, is designed to perform optimally on dedicated application and database servers.

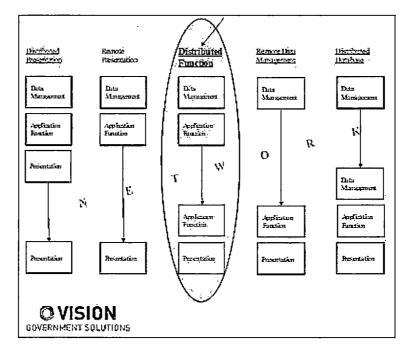
The design of *Vision CAMA* is composed of logical groupings of software components called layers. Layers buffer component dependencies increase reusability of components and enable efficient regression testing. Each logical layer is further broken down into several sub layers, with each sub layer performing a specific type of task. Vision's architecture maximizes maintainability of the code, optimizes the way that the application behaves when deployed in different ways, and provides a clear delineation between locations where certain technology or design decisions were made.

- Interface Tier: Windows Presentation Framework Service: This layer contains the useroriented functionality responsible for managing user interaction with the system and
 consists of components that provide a common bridge into the core business logic
 encapsulated in the business layer. This layer contains user interface subsystems for rich
 user dialogs for data manipulation, search, reporting, user adaptive screens, and
 GIS/Mapping and related imagery components. This layer is implemented in the C#
 programming language and uses Microsoft's Windows Presentation Framework (WPF)
 technology.
- Interface Tier: Application Interface Service: This layer provides services to other applications as well as consumes services from other applications. This layer exposes "public access" events, data entities, and functionality of the application for integration primarily with local site-specific third-party applications such as tax billing software, data warehouses, deeds/imaging, and public facing web sites. The layer is implemented using .NET's Windows Communication Framework and it is written in C#.
- Business Logic Service: This layer implements the core functionality and encapsulates the complex business logic. It consists of components, some of which expose service interfaces that other internal component callers use. Business Logic Service provides validation services for business objects and data entities manipulated by the presentation and interface services. The Business Logic Service also houses a series of CAMA calculation engines written in C#. The CAMA engines provide the core appraisal models in the Vision 8 solution. The engines are implemented using an object-oriented design and can be extended and specialized using standard object-oriented

mechanisms.

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Data Access Service: This layer provides access to data stored within the system, and data exposed from third-party systems or accessed through services. The data layer is implemented in C# and exposes generic interfaces and XML payloads via Windows Communication Framework that higher order components manipulate.



Vision 8 Application Architecture Diagram

Vision CAMA will need to be installed on each workstation utilizing CAMA.

Operating System

Vision 8 is developed for Version 4 of Microsoft's .NET Platform. All client and server system components utilize .NET 4.6.1 runtime services. To leverage these new technologies, Windows 10 operating system or later is required for desktop and laptops. Windows Server 2016or later is required for servers.

Vision 8 Software Development Environment, Languages, and Tools

Our development team uses Microsoft's Visual Studio 2019 and programs in the C# programming language although there are some supporting SQL scripts and stored procedures GOVERNMENT SOLUTIONS

written in the specific SQL dialect of the database. Our software engineers utilize modern object-oriented and service-oriented architecture best practices and have designed the product as a layered services style application architecture.

Vision 8 is a Microsoft SQL based platform and has been created specifically for use with the SQL Server database architecture, currently SQL Server 2019. *Vision 8* is written using C# programming language and Microsoft's Windows Presentation Framework (WPF) and Windows Workflow Foundation (WF) .NET technologies.

Proposed Relational Database Management System

Vision software utilizes Microsoft SQL Server to store all its data.

User Interface

Vision 8 is written using Microsoft's Windows Presentation Framework (WPF).

Release and Patch Update Process

Vision's current cadence is to release "major" (feature) version upgrades to our 8.x platform several times per year and "minor" (patch / bug fix) releases every 4-8 weeks, depending on the level of urgency. Vision 8 customers receive every major and minor release at no additional charge.

If a customer is particularly impacted by a defect, their system update will be prioritized by our Support Team.

Upgrades to underlying infrastructure (Windows OS version patches, e.g.) will generally be managed by the customer's IT department.

Upgrade Creation, Testing, and Release Processes

Vision's software is developed using the agile scrum methodology. Vision works in 2-week iterations that includes writing tests as well as product code. Automated testing is augmented by a manual QA process at the end of each development cycle.

The deployment and upgrade process for application instances running on-premise at customer locations generally involves someone from our technical support team connecting to the system remotely to run installers and database migration scripts for the server installation.

In addition, any client software running on local workstations will be updated at the same time. This process can also be accomplished by the customer's own IT staff if desired. In this instance, the software can be easily downloaded from our FTP server.

Hardware Specifications

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Description of Vision 8 Technical Specs:

Vision 8 is a rich client application that uses a N-tier web service-based application architecture. Vision 8 utilizes the latest software development and operation system technologies from Microsoft.

Document 1-2

Vision 8 is developed for Version 4 of Microsoft's .NET Platform. All client and server system components utilize .NET 4.6.1 runtime services. To leverage these new technologies, Windows 7 operating system or later is required for desktop and laptops. Windows Server 2016 R2 or later is required for servers.

The Vision 8 core business logic and data access services are deployed within the Microsoft's Web Server (IIS 9.0). Vision 8 is optimized to run on Microsoft's SQL Server 2016 database technology. Microsoft SQL Server 2016 or later is required for servers.

This document contains minimal and recommended configurations for the server, client PC's, and printers. There is also a section on basic networking recommendations that will provide some performance gains.

Large Installation Multi Server Setup

A multi-server configuration is required for large/high volume installations of more than 40 users or more than 40,000 parcels.

- The specifications are for a dedicated server i.e. only used by *Vision 8*.
- The disk size specs account for one copy of the database. If multiple copies of the database are needed, the appropriate hard disk sizes should be used.
- The size of server or client hard drives should account for other applications and any future expansion.
- GIS, Associated documents, and JPEG's for images take up a considerable amount of space, 5000 images need 300MB at minimum. The below hard drive recommendations do NOT include sizing for GIS, Associated documents, and images as these file sizes can vary greatly.





Large Installation Configuration

Server	Minimum Hardware Requirements	Optimum Hardware for Performance (Recommended)
Database Server	 Intel Xeon E3-1220 v5.3.0 GHz w/8MB Cache 600 GB under RAID 5 SAS 16 GB RAM 1Gb Ethernet Network Card Windows 2016 Server SQL Server 2016 with Reporting Services 	 Intel Xeon E5-2630 v4 2.2 GHz w/25MB Cache 2 Channel RAID card Operating System under RAID 1 on 1st Channel 600 GB under RAID 5 on 2nd Channel SAS (for SQL Server) 32 GB RAM 1 Gb Ethernet Network Card Windows 2016 Server SQL Server 2017 with Reporting Services
Application Server	 Intel Xeon E3-1220 v5 3.0 GHz w/8MB Cache 600 GB under RAID 5 SAS 16 GB RAM 1Gb Ethernet Network Card Windows 2016 Server 	 Intel Xeon E5-2630 v4 2.2 GHz w/25MB Cache 2 Channel RAID card Operating System under RAID 1 on 1st Channel 600 GB under RAID 5 on 2nd Channel SAS (for SQL Server) 32 GB RAM 1 Gb Ethernet Network Card Windows 2016 Server

Desktop PC

The minimum operating resolution for Vision 8 is 1366x768. For that reason, Vision Government Solutions is increasing its minimum recommended client monitor size to 20"

Document 1-2

Minimum Requirements	Optimum Performance (Recommended)
 Intel Core i5-6500 3.2 Ghz 500 GB Hard Drive (7200 RPM) Windows 10 (64bit) 16 GB RAM 	 Intel Core i9 500 GB Hard Drive (7200 RPM) Windows 10 (64bit) 32 GB RAM
 Color Monitor 22" or plus 100/1000 MB Network Ethernet Card Small UPS Internet Access (At least one Client) 	 Color Monitor 22" or plus 100/1000 MB Network Ethernet Card Small UPS Internet Access (At least one Client) 16:9 aspect ratio is recommended

Printer Configuration

At least one client used for large printing jobs should have sufficient disk space, i.e. 4-6 GB.

Minimum Requirements	Optimum Performance (Recommended)
HP LaserJet P3015 Series Duplex Option (dn or x models) Legal tray 42 PPM (single sided no graphics)	HP LaserJet Enterprise 600 45 PPM (single sided no graphics)

General Recommendations

- Try to keep all application users on the same network backplane as the application server. The application server and database should reside on the same network backplane.
- If possible, use a 1000 MB connection or higher from the server to the network switch
- If possible, make sure your server hard drives are in a RAID configuration for fault tolerance

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Internet/network infrastructure requirements for a cloud hosted solution:

- Internet circuit capable of 20 Megabits upload and download.
- Static public SNAT IP or a range of them for whitelists on our firewall.
- Firewall rules to allow unrestricted traffic to our URLs on ports 80,443,50000. This should include our hosted CAMA server url and reporting server url.
- If you use a layer 7 Web Proxy, we ask that you allow unrestricted traffic to our URLs on ports 80,443,50000. This should include our hosted CAMA server url and reporting server url.
- Your local antivirus must exclude CAMA installation folder and all of its contents from any security scans

Should the City choose to deploy on-premise, the Vision team will work closely with your IT department to determine proper configuration for optimal performance.

VII. Project Implementation

Sample Implementation Plan

The Vision implementation plan is designed to balance the competing requirements of (1) speed and (2) quality. To that end, Vision intentionally includes a number of checkpoints to ensure that you are happy and comfortable with the end results of the data conversion, including review of data mapping, a beta conversion period, and a revised beta conversion. Your Vision Project Manager will also coordinate weekly project touchpoints and collaborate using our online Project Management platform, Basecamp.

Document 1-2

Below, we have included a sample implementation plan. We will update this plan according to the City of Norfolk's needs and required down-time for items such as End of Year processing.

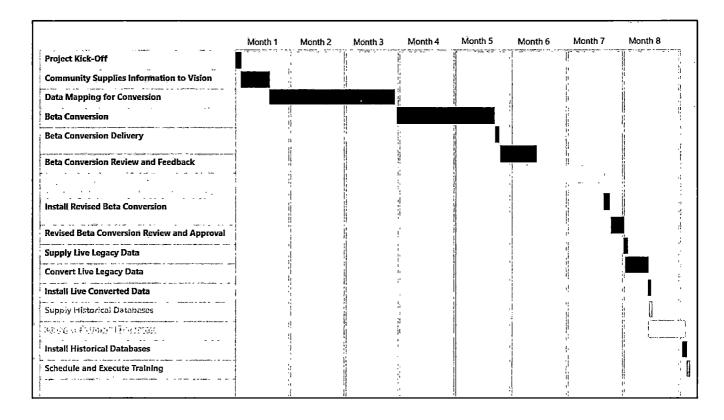
' Milestone	Responsible Party	Schedule Requirements
Contract Negotiations Complete	City and Vision	February
Project Kick-Off	City and Vision	Schedule kick-off call immediately after contract signature
Community Supplies Information to Vision, including Non-Proprietary Legacy Sketch Data	City	+ 2 weeks
Data Mapping for Conversion	Vision	+ 9 weeks
Beta Conversion	Vision	+ 7 weeks
Beta Conversion Delivery	Vision	+ 1 day
Beta Conversion Review and Feedback	City	+ 3 weeks
Revised Beta Conversion with Value Foundation, per Previously Identified Revisions	Vision	+ 4-6 weeks, depending on workload required from revisions



		,
Install Revised Beta Conversion	Vision	+ 1 day
Revised Beta Conversion Review and Approval	City	+ 1 week
Supply Live Legacy Data	City	+ 1 day
Convert Live Legacy Data	Vision	+ 2 weeks
Install Live Converted Data	Vision	+ 1 day
Supply Historical Database	City	+ 0 days
Convert Historical Databases	Vision	+ 2 weeks per database
Install Historical Databases	Vision	+ 1 day
Schedule and Execute Training	City and Vision	Post live install, at mutual convenience

Note: Contract schedule may be adjusted depending on contract signature date.

Implementation Project Plan Gantt Chart



Vision Training Services Overview

Vision focuses on long-term software fluency rather than transactional support "tickets." To that end, we aim to provide three progressive levels of learning:

- (a) Level 1: How to Use Vision CAMA: This encompasses questions like 'what is the exemptions screen for' or 'what does the export report button do.' We call this point-and-click training, and it is a necessary element of any training program. Many training programs stop here, but we believe that additional training is required to achieve true fluency.
- (b) Level 2: Accomplish Your Workflows with Vision 8: This type of training is oriented around real use cases such as closing out the year, responding to taxpayer inquiries, identifying valuation outliers, or managing inspections.
- (c) Level 3: <u>Improve</u> Your Workflows with Vision 8: Software should do more than enable the way you work; it should improve the way you work. This level of learning focuses on the question of: "How can I use software to accomplish my job with *greater* efficiency, improved data and valuation accuracy, and the highest levels of service to our taxpayers?" Our fluency programs are designed to accomplish all three objectives through continuous learning programs.

"We were very happy with the level of support we received. From configuration to where we are now as new users, we are thrilled. Dylan was assigned as our designated Account Manager and was here for our go live day and the two training days after. Matt was on-site with us two days after go-live for training and one-on-one assistance. Their presence and knowledge about Vision left us feeling far more confident in ourselves and our new software than we thought we would be two days in."

City Assessor City of Waynesboro, VA

The Fluency Lifecycle

Traditional training programs often assume defined start & end dates with discrete objectives that are accomplished in a classroom. In contrast, a software fluency program acknowledges that we are all lifelong learners who continuously improve and refresh our knowledge of the software products on which we rely. That's why Vision's fluency program is segmented into

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progressive stages of learning that begin long before go-live and extend throughout the decades-long lifecycle of a CAMA platform:

(a) The First Line of Defense - An Intuitive User Interface:

When is the last time you needed training from Google, Apple, or Windows? The more intuitive the software, the less training required. That's why ease of use is built into Vision's DNA. Below are a few specific examples of how our intuitive User Interface provides the 'first line of defense' to ensure a smooth transition:

- Use Your Community's Language, Not Ours: Every field name is configurable through the User Interface, without costly software development effort – you control your language.
- Empower Users to Leverage the Full Power of the Database: Vision is designed to democratize access to information: in-application 'tool tips' appear when hovering over any field; reporting is designed around 'friendly field names' to enable the entire user base to take advantage of reporting; GIS visualization is accessible to all users, and much more...
- Prevention is the Best Medicine: Built-in data integrity checks (e.g., required fields, field mins and max'es, spellcheck, etc.) ensure that we catch and eliminate data errors at the point of entry, dramatically improving valuation accuracy and user experience.
- Each User is Unique: Vision's Administrative Module enable Administrators to make fields and screens visible, hidden, or required for each set of user permissions. This enables users to see only the fields and screens relevant to them, reducing the number of keystrokes and clicks, improving data integrity, and lowering the threshold for successful training.
- o Work the Way You Work: Vision's built-in 'My Dashboard' functionality enables users to build their own workflows to work the way they work best.
- o It Shouldn't Be Rocket Science: Vision's User Interface is designed to privilege photos, aerial imagery, sketch, GIS visualization, and mobile integration to work on behalf of the user, not the other way around.

(b) Proper Prior Planning (Training During the Implementation):

Every Vision project includes a beta data conversion designed to ensure that each community feels confident with its customized data mapping long in advance of golive. As part of our beta process, we grant access to a 'test database' and schedule trainings for the user base in a risk-free environment. We find that this dramatically improves the effectiveness of change management by capturing 'buy-in' from the entire user base.

We specifically design these sessions around real-life scenarios with hands-on exercises such as 'what to do when a taxpayer calls for information' or 'how to value a commercial property.' To achieve maximum impact, we segment our sessions into user types, including daily CAMA users, advanced appraisal users, and technical support users. This enables the training sessions to focus on the use cases of most impact to each group.

(c) Go-Live Training:

o Our Go-Live Guarantee: Vision guarantees a dedicated onsite resource for each implementation's go-live day to ensure the smoothest transition. We won't leave until you're happy.

Note: This resource will be provided remotely during Covid-19, using Zoom webinar or a web collaboration tool of customer's choice.

- Repetition is the Source of All Learning: Vision provides go-live training sessions to reinforce the learnings from earlier beta trainings, share tips & tricks for improved efficiency, and identify specific areas where users can benefit from Vision CAMA efficiencies to reduce time required to achieve impact and improve valuation accuracy.
- Leave-Behind Resources: Each training session includes leave-behinds with tips, concept sheets, and written training materials designed to empower users to grow in their learning journey creating true fluency over time.

(d) Training Never Stops: Lifelong Continued Learning

Learning doesn't stop after go-live. That's why Vision provides a multitude of resources for continued learning throughout the lifecycle of the CAMA platform, designed to (a) enhance the impact of the software for long-time users and (b)

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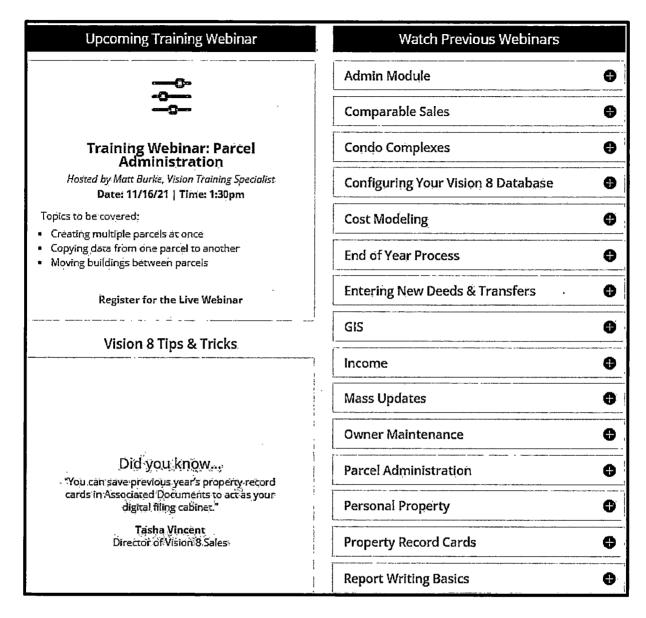


accommodate inevitable personnel changes in any Assessment Office. These are included in our maintenance package at no additional cost.

Document 1-2

- o Virginia Matters: Virginia is unique. That's why Vision will provide a statespecific User Group every year, along with monthly training options covering topics from sketch to advanced appraisal.
- Long-Term Partnership: Every community receives all code updates to Vision CAMA at no additional cost (including all legislative and regulatory updates). With each release, Vision will provide instruction on any new features and workflows.
- Documentation Designed for Real Life: Vision CAMA comes with a fully documented online help portal, organized around common pathways through the CAMA system, designed to empower users with day-to-day self-service help.
- Customer Happiness, not Customer Support: Our Customer Happiness team's mission is to surprise and delight every customer, every day. That's why our Support Team live-answers 99% of calls and resolves 80% of questions on the phone without a call-back.
- Online Customer Learning Portal: Every Vision Customer receives access to our online Customer Portal, which houses our library of instructional webinars, Vision updates, release notes, tips & tricks, upcoming events, and more. Recent training webinars including: Sketching in Vision 8, Admin Module, Condo Complexes, Configuring your Vision 8 Database, Cost Modeling, End of Year Process, Entering New Deeds & Transfers, Income, Parcel Administration, Personal Property, Report Writing and many more. Training topics are influenced by our Support team, ensuring that we are providing updated training for the questions our customers are asking.





Sample Screenshot: Vision 8 Customer Portal, with Monthly Training Webinars

These resources are designed to ensure that users are able to continually maximize the impact of Vision CAMA to reduce time burden, improve valuation accuracy and enhance the taxpayer experience.

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Sample Training Agenda

<u>Day 1</u>

9:00 – 9:15 Introductions 9:15- 10:00 Training Overview 10:00-11:00 System Overview

- Logging In
- Passwords and User Permissions
- Property Record Search by ID, Location, or Owner
- System Navigation Tree
- System Tool Bar
- System Utilities

11:00-11:15 Break

11:15-12:00 System Overview (continued)

- Function Keys
- Movement From Field to Field
- On-Line Help System/ Topic Search

12:00-1:30 Lunch

1:30-2:30 Residential Parcel Walkthrough

- Adding a Sale
- Add Outbuildings and Extra Features
- Changing Existing Data, the "Pick list"
- Create Visit History Information
- Create Building Permit Information
- Add Land Lines
- Tracking Multiple Owners and Addresses

2:30-2:45 Break

2:45-4:00 Condominium Walkthrough

- Condo Main Elements
- Condo Unit Construction Detail
- Condo Complex Table





Day 2

Commercial Walkthrough 9:00-10:15

- Construction Detail Screen
- Add a Section to a Building
- Add Multiple Buildings
- Add Abutting Associated Parcels

10:15-10:30 Break

10:30-12:00 Property Record Cards

- Card Layouts
- Print a Subset of Cards
- Edit the Property Record Card

12:00-1:30 Lunch

1:30-2:45 Adding a Sketch and Photos

- Square Footage Tool
- Drawing and Labeling the Sketch
- Editing the Sketch
- Adding photos

2:45-3:00 **Break**

Geographic Information System (GIS) 3:00-4:00

- Locating a Parcel
- Shape Layers
- Abutters List
- Thematic Displays
- **Custom Queries**

Day 3

Existing Reports and Report Wizard Overview 9:00-10:15

- Reports Menu Tree
- Database Help File
- Create an Ad Hoc Query
- Preview and Print Options
- Add Reports to User Menu

10:15-10:30 Break



10:30- 12:00 Hands on Training

- Create a Real-Life Training Scenario
- Individual Questions
- 12:00-1:30 Lunch
- 1:30-3:45 Hands on Training
 - Create a Real-Life Training Scenario
- 3:45-4:00 Questions and Answers

Day 4

9:00-9:15 Introductions 9:15-9:30 Review of Questions from Training Session #1 9:30-10:30 Table Maintenance

- Setting Parameters
- Building Tables
- Land Tables
- Parcel Tables
- Condo/Mobile Hôme Tables
- User Fields
- Income Tables
- Utilities (Recalculation, Utilities)

10:30-10:45 Break

10:45-12:00 Sales Analysis

- Utilities (Sales Analysis)
- Reports (Sales Analysis)
- Selection Criteria
- Sorting & Grouping
- Analysis Reports, Graphs

12:00-1:30 Lunch

1:30-2:30 Land Valuation

- Property Factors
- Land Line Valuation- value adjustments
- Multiple Valuation Approaches- Standard, Regression, Z-Contour

2:30-2:45 Break



2:45-4:00

Valuation Approaches

- Income
- Comparable Sales
- Cost

Day 5

9:00-10:30

Income Approach

- **Economic Valuation**
- **Actual Valuation**
- **Income Tables**

10:30-10:45 Break

10:45-12:00 Comparable Sales Approach

- Viewing Comparable Sales w/Photos
- Comparable Sales Detail Report
- Running Comparable Sales

12:00-1:15 Lunch

Cost Approach 1:15-2:30

- Setting Base Cost tables
- Creating Cost Adjustments
- Creating Depreciation Adjustments

2:30-2:45 Break

Review of previous training 2:45-4:00

VIII. System Maintenance and Support

Customer Support Package

term customer satisfaction.

Vision's CAMA Support Package represents the highest levels of Customer Support in the industry. We have made deep investments in our Customer Success organization and are pleased to offer those services to the City. Our investment in the Virginia market is unparalleled, and we have Virginia-based resources including state specific User Groups. Every Vision CAMA package includes annual support, comprised of:

Access to a dedicated Customer Success Team responsible for customer happiness and relationship management.

This team is available during go-live and training to kick off your journey to Vision CAMA fluency. This white glove approach eases the challenges of platform migration and significantly improves long

"The whole assessing world commends you and your Vision team for making customer service what it should always be, not just better but the BEST!"

3

City Assessor Ellsworth, ME

Proactive customer success management ensures we surface questions immediately and track relationships between questions that may require remedy via training, data adjustment, or appraisal advice. This provides a customized level of service that extends far beyond the 'ticket-in, ticket-out' mentality of a traditional Help Desk model. Your dedicated Customer Success team also provides the perfect transition from your Project Manager to an ongoing support model. In addition, they will assist you with your first End of Year processing to ensure airtight results.

Access to Vision's Help Desk for a luxurious support experience, backed by our 50person Appraisal Team.

Vision's Help Desk is the fastest and best-staffed in the industry. With 99.5% liveanswered calls and 80% on-call resolution for all users, this option is especially helpful for on-the-fly questions, quick training inquiries, new personnel navigating the platform, and technical troubleshooting.

Vision's Support team thoroughly tracks each interaction and reviews historical customer requests while answering user questions. This approach ensures the Help Desk has a

holistic understanding of each customer, and allows the team to focus on incident recognition, preventing problems before they occur.

In addition, our Support Team has a dedicated process to assign valuation-related questions to our 50-person Appraisal Staff to ensure that higher-level inquiries receive the support they deserve.

All new releases of at no additional charge.

The City of Norfolk will benefit from all the development we put into Vision 8 CAMA at no additional charge. That's why we have a single code branch in Virginia so that all communities can share in enhancements. Code updates will be available and installed at no additional cost.

All modifications necessary to comply with any new and applicable Virginia statutes and/or administrative regulations.

The regulatory landscape changes, and it is our responsibility to flex with it. Vision will work in collaboration with Virginia to incorporate any required statutory or regulatory changes and will disseminate those changes to all users at no additional cost. This is critical for platform longevity.

Access to Annual Virginia-specific User Group events and our Annual National User Group Conference.

"Our upgrade to Vision 8 was great, and everything was seamless. Vision has always been a robust system. It's got a lot of bells and whistles without being too frilly and it's a reasonable price for a locality. It also merges well with our financial software. In regard to your support team, it's clear that Paul (Vision CEO) has put a major focus on improving customer service, because your team as it stands today is awesome. We were on the phone working on a problem we were having with a report and Nate in support fixed it in minutes. I wish all my software providers were as responsive as the Vision team is now!"

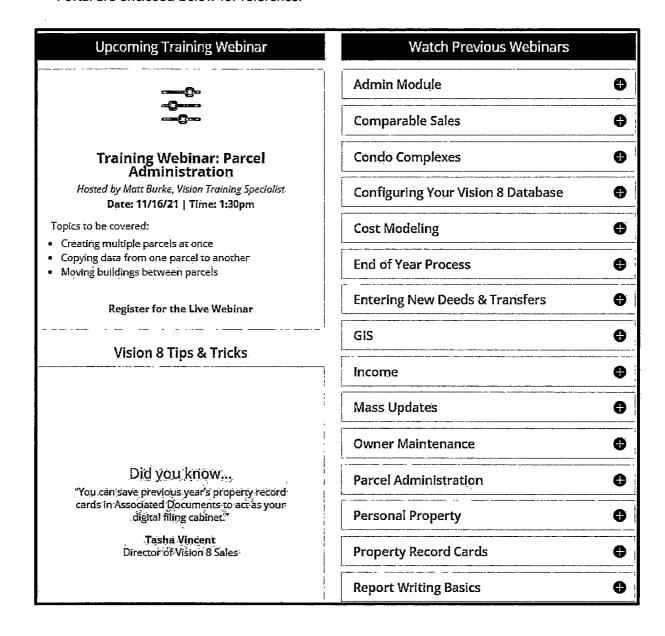
City of Martinsville, Virginia Commissioner of the Revenue

These User Group events are designed to share company updates, circulate best practices, provide group training sessions on basic and advanced usage, and offer direct access to our Leadership and Customer Support representatives for configuration questions.

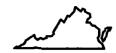
Access to the online Vision Customer Portal, which houses our continuous learning webinar library and help documentation.

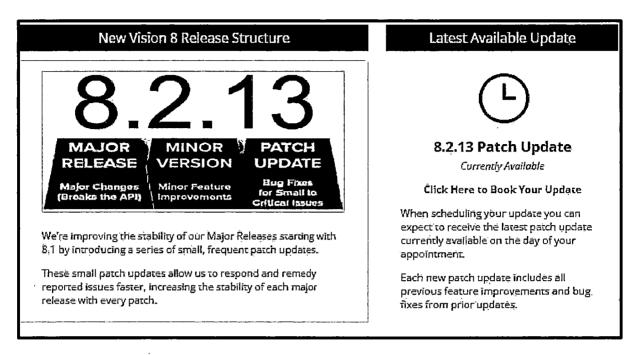


To enable continuous learning and self-service help and training, Vision will provide logins to our online Customer Portal, which houses our Help Documentation, training webinar library, notices of upcoming training events, company news, tips & tricks, release notes and release communications, and more. Sample screenshots of the Customer Portal are enclosed below for reference.



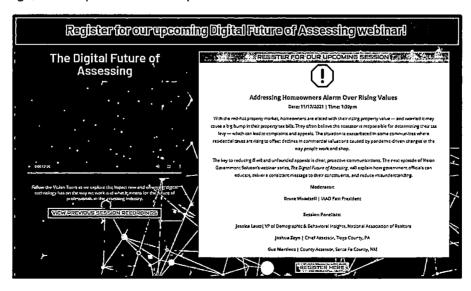
Vision 8 Customer Portal –Training Library





Vision 8 Customer Portal – Release Notes Library

Partner Webinars: In 2020 we launched the Digital Future of Assessing web series, where we partner with both clients and non-clients to deliver relevant assessment and appraisal content to the greater community. Topics range from "Staying Connected to Taxpayers During Social Distancing", to "How to Manage Your Appeals Process". We host the webinars bi-monthly and partner with municipalities across the country. On average, each topic includes 2-3 partner communities and attracts 100 attendees.



Vision Digital Future of Assessing Educational Series

- Online documentation covering nearly every portion of the application, including:
 - Screen Information
 - Legal Information
 - Account Information
 - Owner and Deed
 - Assessment History
 - Other Assessments
 - Exemptions
 - Supplemental Data
 - **Abatements**
 - **Assessment Change**
 - Parcel Address
 - Associated Parcels
 - **Notice History**
 - **Property Notes**
 - Parcel Audit
 - **Sub-Division History**
 - Logging In
 - **Modes of Operation**
 - System Tool Bar
 - How to Search Basic
 - How to Search Advanced
 - **Navigation Tree**
 - Parcel Information Bar
 - Status Area
 - **Track Changes**
 - **How to Save Changes**
 - How to Create a Dashboard
 - How to Select Data and Make Changes
 - Menus File Menu, Cards Menu, Reports Menu, Utilities Menu, Help Menu
 - How to Add a New Parcel
 - How to Add a Second Building to a Parcel

- How to Delete a Building from a Parcel
- How to Add a Section to a Parcel
- How to Change a Parcel Status
- How to Make an Improved Parcel Vacant
- How to Make a Vacant Parcel **Improved**
- How to Use Real Estate Audit
- How to Add a Sale Record
- How to Change Mailing Address and Owner Names
- How to Add Multiple Ownership
- How to Add Parcel Addresses
- How to Add a Personal Exemption
- How to Add an Abatement
- How to Add Notice History
- How to Add Other Assessment or Betterment
- How to Enter Supplemental Data
- How to Add a Property Note
- Abatements Entry and Reporting
- Supplemental Entry and Reporting
- How to Use Sale Trending
- How to Add a Land Line
- How to Add Alternate Land Pricing
- How to Enable Alternate Land Pricing



- How to Add a Building Permit
- How to Add a Fire Damage Entry
- How to Add a Visit History Entry
- How to Add Building Notes
- How to Add an Extra Feature
- How to Add an Outbuilding
- Using the Sketch Tool
- **Editing Sketches**
- How to Save and Open Sketches
- How to Add Photos
- How to Delete a Photo
- How to Move Photos Between Parcels
- How to Add an Associated Document
- How to Edit an Associated Document
- How to Search for an Owner
- How to Add an Owner
- How to Update an Owner Mailing Address
- Supplemental Owner Data
- Owner Associated Documents
- Related Accounts
- How to Add an Assessing Neighborhood
- How to Copy and Factor a Land Curve
- Land Valuation Basics
- How to Add a Subarea Code
- Understanding the Building Size Curve

- Understanding the Outbuilding Size Curve
- How to Create a Vacant Parcel
- How to Copy a Parcel
- How to Move a Building
- Report Wizard Overview
 - Selecting Fields
 - o Grouping Data
 - o Selection Criteria
 - Navigating Results
 - o Saving and Opening Reports
 - o Saving Reports as CSV, PDF, RDL, etc.
- Using the Mail Merge Wizard
- Rate Files: Construction Allowables
- Rate Files: Cost Group Rates
- Rate Files: Cost Models
- Rate Files: Extra Features
- Rate Files: Outbuilding Codes
- Rate Files: Site Index
- Rate Files: Subareas
- Assessed Values by Location
- Cost Modeling Basics
- Comp Sales Values
- How to Recalc Marshall & Swift Values
- Common Updates Using Mass Update
- Advanced Updates Using Mass Update
- How to Add Notes Using Mass Update
- How to Add Notice History Using Mass Update
- How to Add Visit History **Using Mass Update**

VISIONGOVERNMENT SOLUTIONS



- _____
 - How to Insert Overrides and Adjustments
 - Plus, tips & tricks for Data Entry, Table Entry, Navigation, etc.
 - Monthly training webinars include topics such as:
 - Vision CAMA Basics
 - The Admin Module

- Configuring Your Vision
 CAMA Database
- End of Year Process
- Entering New Deeds & Transfers
- Report Writing
- Parcel Administration
- Property Record Cards
- Sketching
- And many others





IX. Pricing

SOFTWARE AND IMPLEMENTATION SERVICES (ONE-TIME COST)

Vision 8 CAMA Software License

Commercial Off-the-Shelf Vision 8 Software

Included

Includes Vision GIS and Marshall & Swift Modules 27 Full Access Users and 20 Read-Only Licenses

Project Implementation Services

Data Conversion Services

Included

Beta Conversion

Revised Beta Conversion

Production Conversion

(Includes Production Database + 5 Historical Years)

Project Management Services

Included

9-Month Implementation Plan

Dedicated Project Manager for Duration of Project

Access to Online Project Management Platform for Collaboration

Access to Vision Cloud for Duration of Project

(Optional)

Included

Imports & Exports

Included

Export to Tax Solution

Vision Standard Building Permit Import

Vision Analytics

Included

Configuration of Five (5) Standard Executive Analysis Dashboards

MobileAssessor Vision 8 Linkage

Included

Transition of MobileAssessor linkage from ProVal to Vision 8

Training Services

Included

8 Days of Training Sessions for Up to 15 General Users

2 Days of Training for System Administrators

Bank of 4 "Refresher" Training Days

. . . .

(continued below)



VISION 8 COTS DEPLOYMENT - TOTAL

\$687,000

Proposal Scope Clarifications

- This proposal assumes 72,900 parcels
- This quote is valid for 180 days
- Price reduction options are available for removal of historical database conversions
- Conversion services include full database conversion as described above plus unlimited years of prior assessment history and ownership history that can be provided by City of Norfolk.
- Conversion services assume the City will provide legacy data in electronic format, using
 the same database language and structure for each historical database year. For sketch
 conversion, the City of Norfolk will be responsible for providing sketch data in nonproprietary traverse / string language format which shows "pen" movements for each
 sketch shape and links each shape to its associated sketch label. The sketch data shall
 also include pointers from which we can derive spatial relationship between shapes.
- Vision assumes that legacy data has been cleansed for data conversion prior to extract to Vision. This quote does not include data clean-up or data collection services.
- The Vision 8 license assumes Vision's Commercial-off-the-Shelf software.
- This proposal does not include license fees for third-party products such as ESRI's
 ArcGIS or any hardware or SQL licensing. If the City elects for Vision cloud hosting, SQL
 licensing will not be required.
- Vision has been successful implementing remotely and has reduced travel to a minimum. Travel is now billed as used, The City will be asked to pre-approve all travel.
- Vision invoices based on milestone deliverables, rather than Time & Materials. These keeps us aligned with deliverable timelines and ensures accountability.





Annual Software Maintenance

SOFTWARE MAINTENANCE AND SUPPORT

Year 1	\$54,750
Year 2	\$57,215
Year 3	\$59,788
Year 4	\$62,479
Year 5	\$65,290

Includes:

Maintenance of Vision 8 Live and Test instances

Access to Vision's Help Desk for assistance and support, with 99.5% of live calls answered and 85% first-call resolution.

Access to our online *Vision 8* Customer Portal, including help documentation, monthly training webinars, tips & tricks, release communication, and more.

Access to monthly online training webinars and our webinar library.

All new releases of *Vision 8 CAMA* at no additional charge.

Modifications necessary to comply with new and applicable Virginia statutes and/or administrative regulations.

Access to our Virginia User Group events and annual National User Group event.





Optional Implementation Add-Ons

Based on the Requirements in Appendix I, we identified the following options that require more information or may be of interest to the City of Norfolk:

Optional Item	<u>Price</u>
Taxpayer Website Hosting Services	\$12,500 / year
Annual Cloud Hosting Services	\$24,750 / year
JustAppraised Deed Import Solution	Priced upon scoping
Custom Workflow Configurations	Priced upon scoping
Document Hyperlink/Smartlink Configuration	Priced upon scoping
Additional Custom Imports or Exports	Priced upon scoping
Modifications to COTS Vision 8	Priced upon scoping
Per Diem Training	\$1,400 / day

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X. Contracting and Employment Outreach Plan

Vision will be using existing Vision resources to complete the proposed project. Vision will not be subcontracting for this proposal, with the exception of working with third-party vendors currently in use by the City to facilitate integrations (such as Data Cloud Solutions' MobileAssessor software).

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XI. Exceptions to the City's contractual terms and conditions

Vision takes exception to specific City of Norfolk Terms and Conditions (but not limited to) those listed below. A CAMA implementation is a very specific project requiring specific terms to protect both the jurisdiction as well as the Vendor. Vision fully expects to be able to reach mutually agreeable contracting terms with the City. Vision has 29 jurisdictions operating our software in the Commonwealth of Virginia and has successfully executed mutually agreeable terms with each one of them.

Terms & Conditions that Vision respectfully requests to negotiate include substitution of personnel (Page 6), User Acceptance Testing terms (Page 8), hours of Support (Page 8 and 9), software warranties and error notification (page 10), liability of Contractor (page 10), Insurance Terms subject to confirmation with Vision COI (Page 18), indemnification (Page 19), and termination for convenience (Page 20). Regarding the User Acceptance Testing terms, Vision provides a Beta Review and Revised Beta Review period in our standard project schedule. This period is designed to review the data conversion. Vision is proposing Commercial-off-the-Shelf Vision 8 currently in use by 29 Virginia jurisdictions. For this reason, acceptance testing of the software functionality is not included in this proposal. In addition, the Vision cloud hosting offering is not a browser-based system as indicated in Page 6 and the number of users is limited to the total number of licensed users for the CAMA system.

As proposed revisions, Vision has provided our Commonwealth of Virginia contracting documents outlining this complex project with specific project deliverable terms and specifications as well as protections for both the vendor and the end user for review by the City of Norfolk.

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XII. Attachments

Please find attachments A through G on the following pages.

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SECTION V: ATTACHMENTS

ATTACHMENT A: ANTI-COLLUSION STATEMENT

TO ALL OFFERORS: EXECUTE AN

EXECUTE AND RETURN WITH PROPOSAL DOCUMENTS.

In the preparation and submission of this proposal, on behalf of <u>Vision Government Solutions</u>(name of offeror), we did not either directly or indirectly enter into any combination or arrangement with any person, firm or corporation, or enter into any agreement, participate in any collusion, or otherwise take any action in the restraint of free competition in violation of the Sherman Anti-Trust Act, 15 USCS § 1 et seq., or the Conspiracy to Rig Bids to Government statutes, Virginia Code §§ 59.1-68.6 through 59.1-68.8.

The undersigned offeror hereby <u>certifies</u> that this agreement, or any claims resulting there from, is not the result of, or affected by, any act of collusion with, or any act of, another person or persons, firm or corporation engaged in the same line of business or commerce; and, that no person acting for, or employed by, the City of Norfolk has an interest in, or is concerned with, this proposal; and, that no person or persons, firm or corporation, other than the undersigned, have or are interested in this proposal.

Signature:

Name: Diane Basile

Title: Chief Financial Officer

Date: 12/13/2021

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ATTACHMENT B: ETHICS IN PUBLIC CONTRACTING

Sec. 33.1-86. - Purpose.

The provisions of this chapter supplement, but do not supersede, other provisions of law including but not limited to, the State and Local Government Conflict of Interests Act (Virginia Code, § 2.1-639.1 et seq.), the Virginia Governmental Frauds Act (Virginia Code, § 18.2-498.1 et seq.), and Articles 2 (Virginia Code, § 18.2-438 et seq.) and 3 (Virginia Code, § 18.2-446 et seq.) of Chapter 10 of Title 18.2 (related to bribery). The provisions of this article apply notwithstanding the fact that the conduct described may not constitute a violation of the State and Local Government Conflict of Interests Act. (Ord. No. 33,095, § 1, 9-11-84; Ord. No. 34,573, § 2, 6-30-87)

Sec. 33.1-87. - Proscribed participation by public employees in procurement transactions.

Except as may be specifically allowed by provisions of the State and Local Government Conflict of Interests Act (Virginia Code, section 2.1-639.1 et seq.), no public employee having official responsibility for a procurement transaction shall participate in that transaction on behalf of the public body when the employee knows that:

- 1. The employee is contemporaneously employed by a bidder, offeror or contractor involved in the procurement transaction; or
- 2. The employee, the employee's partners, or any member of the employee's immediate family holds a position with a bidder, offeror or contractor such as an officer, director, trustee, partner or the like, or is employed in a capacity involving personal and substantial participation in the procurement transaction, or owns or controls an interest of more than five (5) percent; or
- 3. The employee, the employee's partner, or any member of the employee's immediate family has a pecuniary interest arising from the procurement transaction; or
- The employee, the employee's partner, or any member of the employee's immediate family is negotiating, or has an arrangement concerning, prospective employment with a bidder, offeror or contractor.

(Ord. No. 33,095, § 1, 9-11-84; Ord. No. 34,573, § 3, 6-30-87)

Sec. 33.1-88. - Solicitation or acceptance of gifts.

No public employee having official responsibility for a procurement transaction shall solicit, demand, accept, or agree to accept from a bidder, offeror, contractor or subcontractor any payment, loan, subscription, advance, deposit of money, services or anything of more than nominal or minimal value, present or promised, unless consideration of substantially equal or greater value is exchanged. The city may recover the value of anything conveyed in violation of this section.

(Ord. No. 33,095, § 1, 9-11-84)

Sec. 33.1-89. - Disclosure of subsequent employment.

No public employee or former public employee having official responsibility for procurement transactions shall accept employment with any bidder, offeror or contractor with whom the employee or former employee dealt in an official capacity concerning procurement transactions for a period of one year from the cessation of employment by the city unless the employee, or former employee, provides written notification to the city manager prior to commencement of employment by that bidder, offeror or contractor. (Ord. No. 33,095, § 1, 9-11-84)

Sec. 33.1-90. - Gifts by bidders, offerors, contractors or subcontractors.

No bidder, offeror, contractor or subcontractor shall confer upon any public employee having official responsibility for a procurement transaction any payment, loan, subscription, advance, deposit of money,

services or anything of more than nominal value, present or promised, unless consideration of substantially equal or greater value is exchanged.

(Ord. No. 33,095, § 1, 9-11-84)

Sec. 33.1-91. - Kickbacks.

- No contractor or subcontractor shall demand or receive from any of his suppliers or his subcontractors, as an inducement for the award of a subcontract or order, any payment, loan, subscription, advance, deposit of money, services or anything, present or promised, unless consideration of substantially equal or greater value is exchanged.
- 2. No subcontractor or supplier shall make, or offer to make, kickbacks as described in this section.
- 3. No person shall demand or receive any payment, loan, subscription, advance, deposit of money, services or anything of value in return for an agreement not to compete on a public contract.
- 4. If a subcontractor or supplier makes a kickback or other prohibited payment as described in this section, the amount theREAf shall be conclusively presumed to have been included in the price of the subcontract or order and ultimately borne by the city and will be recoverable from both the maker and recipient. Recovery from one offending party shall not preclude recovery from other offending parties.

(Ord. No. 33,095, § 1, 9-11-84)

Sec. 33.1-92. - Purchase of building materials, supplies or equipment from architect or engineer prohibited.

Except in cases of emergency, no building materials, supplies or equipment for any building or structure constructed by or for the city shall be sold by or purchased from any person employed as an independent contractor by the city to furnish architectural or engineering services, but not construction, for such building or structure, or from any partnership, association, or corporation in which such architect or engineer has a pecuniary interest.

(Ord. No. 33,095, § 1, 9-11-84)

Sec. 33.1-92.1. - Participation in bid preparation; limitation on submitting bid for same procurement.

No person who, for compensation, prepares an invitation to bid or request for proposals for or on behalf of the city shall:

- i. Submit a bid or proposal for that procurement or any portion the REAf; or
- ii. Disclose to any bidder or offeror information concerning the procurement that is not available to the public. However, the city may permit such person to submit a bid or proposal for that procurement or any portion theREAf if the city determines that the exclusion of the person would limit the number of potential qualified bidders or offerors in a manner contrary to the best interests of the city.

(Ord. No. 43,223, § 2, 9-9-08)

Sec. 33.1-92.2. - Certification of compliance required; penalty for false statements

- 1. The city may require public employees having official responsibility for procurement transactions in which they participated to annually submit for such transactions a written certification that they complied with the provisions of this article.
- Any public employee required to submit a certification as provided in subsection (1) who knowingly makes a false statement in the certification shall be punished as provided in section 33.1-95.
 (Ord. No. 43,223, § 2, 9-9-08)

Sec. 33.1-92.3. - Misrepresentations prohibited.

No public employee having official responsibility for a procurement transaction shall knowingly falsify, conceal, or misrepresent a material fact; knowingly make any false, fictitious or fraudulent statements or

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representations; or make or use any false writing or document knowing it to contain any false, fictitious or fraudulent statement or entry. (Ord. No. 43,223, § 2, 9-9-08)

Sec. 33.1-93. - Penalty for violation.

Willful violation of any provision of this article shall constitute a Class 1 misdemeanor. Upon conviction, any public employee, in addition to any other fine or penalty provided by law, shall forfeit his employment. (Ord. No. 33,095, § 1, 9-11-84)

State Law reference— Similar provisions, Code of Virginia, § 11-80. Sec. 33.1-94-33.1-100. - Reserved.

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ATTACHMENT C: NON-DISCRIMINATION

Sec. 33.1-53. - Employment discrimination by contractor prohibited.

Every contract over one thousand dollars (\$1,000.00) shall include or incorporate by reference the following provisions:

- 1. During the performance of this contract, the contractor agrees as follows:
 - a. The contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex, disability or national origin, except where religion, sex, sexual orientation, gender identity, national origin, age, disability, genetic information, marital status, political affiliation, whistleblower activity, parental status, military service or any other characteristic protected by federal or state law. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this non-discrimination clause.
 - b. The contractor, in all solicitations or advertisements for employees placed by or on behalf of the contractor, will state that such contractor is an equal opportunity employer.
 - c. Notices, advertisements, and solicitations placed in accordance with federal law, rule, or regulation shall be deemed sufficient for the purpose of meeting the requirements of this section.
- 2. The contractor will include the provisions of the foregoing paragraphs a, b, and c in every subcontractor or purchase order of over ten thousand dollars (\$10,000.00), so that the provisions will be binding upon each subcontractor or vendor.

(Ord. No. 33,095, § 1, 9-11-84; Ord. No. 39,912, § 1, 4-11-2000)

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ATTACHMENT D - CERTIFICATION REGARDING DEBARMENT, SUSPENSION, PROPOSED DEBARMENT, AND OTHER RESPONSIBILITY MATTERS

I. CERTIFICATION.

The offeror certifies, to the best of its knowledge and belief, that-

- (i) The offeror and/or any of its Principals—
 - (A) Are __are not ✓ presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any federal, state or local agency;
 - (B) Have __ have not __ within a three-year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) contract or subcontract; violation of federal or state antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, or receiving stolen property; and
 - (C) Are __ are not ✓ presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any of the offenses enumerated in paragraph (a)(1)(i)(B) of this provision.
- (ii) The offeror has ___ has not $\sqrt{}$, within a three-year period preceding this offer, had one or more contracts terminated for default by any federal, state or local agency.

"Principals," for the purposes of this certification, means officers; directors; City's; partners; and, persons having primary management or supervisory responsibilities within a business entity (e.g., general manager; plant manager; head of a subsidiary, division, or business segment, and similar positions).

II. <u>INSTRUCTIONS.</u>

- a. The offeror shall provide immediate written notice to the Contracting Officer if, at any time prior to contract award, the offeror learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
- b. A certification that any of the items in paragraph (a) of this provision exists will not necessarily result in withholding of an award under this solicitation. However, the certification will be considered in connection with a determination of the offeror's responsibility. Failure of the offeror to furnish a certification or provide such additional information as requested by the appropriate City purchasing official may render the offeror non-responsible.
- c. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render, in good faith, the certification required by paragraph (a) of this provision. The knowledge and information of an offeror is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.
- d. The certification in paragraph (a) of this provision is a material representation of fact upon which reliance was placed when making award. If it is later determined that the offeror/ PPEs knowingly rendered an erroneous certification, in addition to other remedies available to the City, the

appropriate City purchasing official may terminate the contract resulting from this solicitation for default.

III. <u>NOTICE</u>.

This Certification Concerns a Matter Within the Jurisdiction of an Agency of the United States and the Making of a False, Fictitious, or Fraudulent Certification May Render the Maker Subject to Prosecution Under Section 1001, Title 18, United States Code.

Signature:

Name: Diane Basile

Title: Chief Financial Officer

Date: 12/13/2021

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ATTACHMENT E: COMPLIANCE WITH FEDERAL IMMIGRATION LAW

I. CERTIFICATION.

The offeror certifies, to the best of its knowledge and belief, that -The offeror or any of its Principals at all times during which any term of the contract is in effect, (Please fill in with your enterprise's complete name) Vision Government Solutions does not and shall not knowingly employ any unauthorized alien. For purposes of this section, an "unauthorized alien" shall mean any alien who is neither lawfully admitted for permanent residence in the United States nor authorized to be employed by either Title 8, section 1324a of the United States Code or the U.S. Attorney General.

II. INSTRUCTIONS.

- The offeror shall provide immediate written notice to the Contracting Officer if, at any time prior to contract award, the offeror learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
- b. A certification that any of the items in paragraph (a) of this provision exists will not necessarily result in withholding of an award under this solicitation. However, the certification will be considered in connection with a determination of the offeror's responsibility. Failure of the offeror to furnish a certification or provide such additional information as requested by the appropriate City purchasing official may render the offeror non-responsible.
- Nothing contained in the foregoing shall be construed to require establishment of a c, system of records in order to render, in good faith, the certification required by paragraph (a) of this provision. The knowledge and information of an offeror is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.
- The certification in paragraph (a) of this provision is a material representation of fact upon ď. which reliance was placed when making award. If it is later determined that the offeror knowingly rendered an erroneous certification, in addition to other remedies available to the City, the appropriate City purchasing official may terminate the contract resulting from this solicitation for default.

3. NOTICE.

This certification concerns a matter within the jurisdiction of an agency of the United States and the making of a false, fictitious, or fraudulent certification may render the maker subject to prosecution under section 1001, Title 18, United States Code.

Signature:

Name: Diane Basile

Title: Chief Financial Officer

Date: 12/13/2021

ATTACHMENT F: COMPLIANCE WITH STATE LAW – AUTHORIZATION TO TRANSACT BUSINESS IN THE COMMONWEALTH OF VIRGINIA

I. <u>CERTIFICATION:</u>

A.	The	offeror	(Please	fill i	n with	your	enterprise's	comple	ete name)
	Vision G	overnment	Solutions		- − εer	tifies that	it is organi	ized or au	thorized to
	transac	t business	in the Con	monwea	alth pursua	nt to Title	13.1 or Title	50.	
	The id	entificatio	n number	issued	to offero	r by the	State Cor	poration	Commission:
В.	Offeror	that is no	t required	 to be aut	horized to	transact b	usiness in th	ne Commo	nwealth as a
			-						by law shall
des	cribe	•	it is	not	require	d to	be	so au	thorized:
	F-1514	142-3				-			

II. <u>INSTRUCTIONS:</u>

- a. The offeror shall provide immediate written notice to the Contracting Officer if, at any time prior to contract award, the offeror learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
- b. A certification that any of the items in paragraph (a) of this provision exists will not necessarily result in withholding of an award under this solicitation. However, the certification will be considered in connection with a determination of the offeror's responsibility. Failure of the offeror to furnish a certification or provide such additional information as requested by the appropriate City purchasing official may render the offeror non-responsible.
- c. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render, in good faith, the certification required by paragraph (a) of this provision. The knowledge and information of an offeror is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.
- d. The certification in paragraph (a) of this provision is a material representation of fact upon which reliance was placed when making award. If it is later determined that the offeror knowingly rendered an erroneous certification, in addition to other remedies available to the City, the appropriate City purchasing official may terminate the contract resulting from this solicitation for default.

Signature: Diane Basile

Title: Chief Financial Officer

Date: 12/13/2021

I.

ATTACHMENT G: EQUAL OF	PPORTUNITY BUSINESS ST	ATUS
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es, please ch	eck the appropriate category:	
	African American (male)	African American (female)
	Hispanic (male)	Hispanic (female)
	Asian American (male)	Asian American (female)
	American Indian (male)	American Indian (female)
-	Eskimo (male)	Eskimo (female)
	Aleut (male)	Aleut (female)
	Other (male)	Caucasian (female)
		Other (female)
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abled Veteral ticipation of s posed Name(posed Mino	ns. All prime contractors should small, women owned, minority is s) of your Subcontractor(s)	furnish the following information regovernments and disabled veto pusiness enterprises

4.	Proposed Description of Project:
5. ·	Proposed Total value of awards to all subcontractors:
6.	Proposed Total Number of minority subcontracts awarded:
If vou	do not propose the use of any subcontractors, please check here:

II. <u>INSTRUCTIONS</u>

The City encourages small businesses and businesses owned by women and minorities and disabled veteran to compete and encourages non-minority firms to provide for the participation of small businesses and businesses owned by women and minorities through subcontracting, partnerships, joint ventures, and other contractual opportunities. All contractors are requested to provide information in its proposal response indicating the planned use of such businesses in fulfilling any resulting contract.

OVISION



XIII. Addendum #1

GOVERNMENT SOLUTIONS

Please find Addendum #1 on the following page.

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November 15, 2021

TO: ALL POTENTIAL OFFERORS

RE: RFP 9230-0-2022 ML RFP Device Management - Addendum 1

Due: December 13, 2021, at 2:00 p.m. Eastern Time

The above referenced RFP is hereby amended to include the following:

The addendum to address questions asked will be released on Friday, November 19, 2021.

All other provisions of the RFP shall remain unchanged. The provisions, herein, shall become part of the RFP package, and offeror shall acknowledge receipt of the addendum by signing in the space provided below and returning it with your proposal.

Offeror: Vision Government Solutions

Signature: // BWY

Date: 12/13/2021

Sincerely,

Mia Lorenz

Procurement Specialist

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XIV. Addendum #2

Please find Addendum #2 on the following page.

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November 19, 2021

TO: ALL POTENTIAL OFFERORS

RE: RFP 9230-0-2022 ML RFP Device Management – Addendum 2

Due: December 13, 2021, at 2:00 p.m. Eastern Time

The above referenced RFP is hereby amended to include the following:

- Q.1. Does the City of Norfolk have a preferred implementation start date and/or go live date for new CAMA and Land Records solution?
- A.1. The preferred implementation date is 7/1/2023.
- Q.2. Pages 25 and 26, Sections IV and VI: Can you clarify what information requested in Section IV is different than Section VI?
- A.2. VI includes a request for more detailed information, to include training, communication protocols, testing, and a project narrative.
- Q.3. Page 26, Section V: "Itemize all hosting, storage, retrieval, legacy data handling, ancillary services, and PCI compliance updates." Is this request for the SaaS solution and/or the on-premises solution?
- A.3. Both.
- Q.4. Page 5, 4.h. "Post Implementation Support Phase "Contractor will provide desk-side and a solution-specific helpdesk to support operational and maintenance needs." What is meant by "~desk-side" to support operational and maintenance needs."
- A.4. "Desk-side" is meant to be on-site support at the desk of the employee. Obviously, this is not intended to envision a lengthy, on-site support phase, but to be available if needed and mutually agreed to by the Assessor and Vendor.
- Q.5. Page 8, III.a.1. "The Contractor shall provide ongoing maintenance of all software, equipment, servers, hard and soft connections, communication network, and other elements." Is this request for the SaaS solution and/or the on-premises solution? If on-premises, is the expectations is that the City would be responsible for testing of new software, equipment, servers, hard and soft connections, communication network, and other elements?
- A.5. Both; on-premises hardware/connections will be completed by the City. Only items provided by the Contractor will be maintained by the Contractor.

- Q.6. Page 7, G.2. "The Contractor shall perform separate training sessions, focused by job responsibility for end users, system administrators, and other support personnel as required by the City, with training materials provided in electronic format." Would the City also consider a train-the-trainers approach where we train and support key users to train other users for the solution implementation and also after implementation as new users are hired or users change roles.
- A.6. Train the trainer is not envisioned initially. We would prefer to begin with separate training sessions and envisioned above, with train the trainer as a later alternative.
- Q.7. Specification #8: Can you provide an example of a stipulation agreement?
- A.7. A stipulation agreement is a written agreement between the Assessor and property owner for a resolution of the appeal.
- Q.8. Specification #24: Do you wish to use Marshall & Swift cost model as well as a custom cost model?
- A.8. Yes.
- Q.9. Specification #24: Do you wish to use Marshall & Swift cost for both residential and commercial properties?
- A.9. Yes.
- Q.10. Specification #26: Does you currently use Marshall & Swift for either residential or commercial property?
- A.10. To a degree, yes for both. Aumentum Technologies prepares the Marshall and Swift tables for users. Some of the tables are modified to be adapted to the ProVal valuation engine.
- Q.11. Specification #110: What types of exemption calculations are needed?
- A.11. Norfolk has no properties qualifying for present use valuation, but it may be prudent to have the capability if the need should ever arise. The City Assessor does not handle Senior Citizen, Military or other income-based exemptions these are handled within the Treasurer's PCI system.

The City Assessor is responsible the "institutional" exemptions granted by <u>classification</u> and <u>designation</u> per the Virginia Code. Examples of exemptions by classification include churches, charitable hospitals, and property owned by units of government. Exemptions by designation are those properties designated for exemption by the City Council. The software solution should have the capability of exempting all or a portion of the property for exemption.

Another type of exemption is Tax Abatements. These are older, historic (more or less) properties in which the value of a renovation is "abated" from taxation. The City Assessor needs to establish a "baseline" (starting) value, the full improved value after renovation, and the difference.

Q.12. Specification #118: What types of tax abatements are currently used or planned to be used?

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 - A.12. Only the Tax Abatements as described above. These are older, historic (more or less) properties in which the value of a renovation is "abated" from taxation. The City Assessor needs to establish a "baseline" (starting) value, the full improved value after renovation, and the difference.
 - Q.13. Specification #136: Are legally mandated files/reports mentioned here different than state required files/reports? If so, can you provide examples?
 - A.13. No.
 - Q.14. Specification #144: What is meant by Land Book?
 - A.14. Reference Virginia Code 58.1-3301. The Land Book is the same as a Tax Scroll. Tax Digest or other common descriptions basically showing a roster of all land within the jurisdiction and the taxes levied.
 - Q.15. Specification #171: What software is used for the Tax Abatement system?
 - A.15. In house, developed in VB.Net.
 - Q.16. Specification #190: Can you explain the process of roll corrections?
 - A.16. Roll corrections are known as 'Assessment Corrections' and are posted with this heading which is read by the Treasurer's Office. State Code allows these corrections only for the current year and three previous years.
 - Q.17. Specification #238: How are ownership record numbers currently used?
 - A.17. Ownership record numbers are unique to the Assessor's Office. It should be noted the Treasurer's Office uses their own numbering system within the PCI system. They are used as the parcel identifier and have an 8 digit numbering scheme. The ProVal system assigns a system-generated number called the LRSN. The numbers are used primarily to access individual parcel records.
 - Q.18. Specification #249: Do you wish to maintain and value mobile homes in the new solution? If so, will these be valued per third party provided schedules?
 - A.18. The City Assessor does not assess manufactured or mobile homes. These are personal property and handled by the Commissioner of the Revenue. We need the ability to value mobile-home parks as a whole, by valuing "mobile-home pad-sites" (via income-schedule provided), and/or through the Sales Comparison Approach. We do not value the individual mobile-homes themselves.
 - Q.19. Specification #308: Can you provide more information on what is desired for the automated cost table updates? Is this related to using the Marshall & Swift cost model?
 - A.19. Yes, this is related to the Marshall and Swift model. The City Assessor reassess property annually, so there is a need to update cost tables annually. Updates would be for the future or reassessment year and would not apply to current year quarterly updates.

Q.20. Is an export of data in the form of an extract going to be acceptable or are you looking for a different transfer method for the interfaces to Norfolk Air, BasicGov Permitting, Laserfiche, AppraisalEst, Clerk of Court systems and Tax Abatement system?

- A.20. We would prefer the Tax Abatement process be handled within the software solution, and not in a separate application. Norfolk Air is updated from the software solution. An extract is generally acceptable.
- Q.21. Do you currently have an Appeals application to manage the requirements in the Appeals section of Attachment I? If yes, how does the transfer of information from your CAMA to that application occur?
- A.21. We use an in-house process which uses Microsoft Access with VBA to write appeal changes entered by the user into the appeals table of the CAMA system database.
- Q.22. How many CAMA users does the City of Norfolk anticipate for the new software?
- A.22. We currently have 25-27 users in the Assessor's Office and approximately 20 users outside of our office.
- Q.23. Has the City already seen any vendor demonstrations? If so, would the City name the Vendors?
- A.23. Yes Aumentum, Arist and Vision

All other provisions of the RFP shall remain unchanged. The provisions, herein, shall become part of the RFP package, and offeror shall acknowledge receipt of the addendum by signing in the space provided below and returning it with your proposal.

Offeror: Vision Government Solutions

Signature:

Date: 12/13/2021

Sincerely,

Mia Lorenz

Procurement Specialist

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XVI. Sample Contracts

Please find Sample Contracts on the following page.

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CAMA SOFTWARE

STATEMENT OF WORK

This CAMA Software Statement of Work ("SOW") is made part of the Master Software License and Services Agreement (the "Agreement") by and between Vision Government Solutions, Inc., a Massachusetts corporation with its principal place of business at 1 Cabot Road, Hudson, Massachusetts 01749 ("Vision") and the customer identified below ("Customer"). Vision and Customer may be collectively referred to as "Parties" or individually as a "Party."

WHEREAS, Vision is willing to provide, and Customer desires Vision's provision of certain Software, on the terms and subject to the conditions set forth herein.

NOW, THEREFORE, in consideration of the foregoing premises and of the conditions and mutual covenants contained herein, and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the Parties hereto agree as follows:

1 Definitions

- 1.1 All capitalized terms used herein will have the meanings attributed to them within the Agreement unless otherwise noted.
- 1.2 "User" means a named end-user of the Software who has the Software installed upon his/her workstation.

2 Software Description

- 2.1 The following Software is being licensed to the Customer according to the terms of the Agreement:
 - a) The Software is the Vision Government Solutions, Inc., Windows-based computer-aided mass appraisal (CAMA) software, Appraisal Vision Version 8. The software elements included are designed for real estate valuation including, cost and comparison sales, data maintenance, sales analysis, reporting and query, image display, and income capitalization
 - b) The Software includes Vision's commercial off-the-shelf GIS module and Vision's commercial-off-the-shelf Marshall & Swift module.
- 2.2 The Software is commercial off-the-shelf (COTS) and may be configured, not customized, to address Customer requirements.
- 2.3 The Customer's Designated Hardware must comply with the applicable minimum hardware specifications, which may be updated by Vision from time to time.
- 2.4 Only Vision-developed connections to the database will be supported at Vision's sole discretion.

3 Users

- 3.1 The Software is being licensed pursuant to the Agreement with the understanding that it will only be installed on the Designated Hardware and on workstations for use up to the maximum number of Users identified below.
- 3.2 The Software is being licensed for up to (27) Users, with an additional (20) read-only Users.

4 Warranty; Maintenance

- 4.1 The Software Warranty as described within the Agreement shall be the exclusive warranty governing the Software provided within this SOW.
- 4.2 The Services Warranty as described within the Agreement shall be the exclusive warranty governing any Services provided within this SOW.
- 4.3 Any software maintenance, separate from any software maintenance which may be part of the Software Warranty shall be governed by a separate Schedule.

5 Project Management

- 5.1 Vision will assign specific personnel to oversee implementation of the Software, and to act as the primary point-of-contact on behalf of Vision to communicate with the Customer.
- 5.2 Customer will assign a primary point-of-contact to work with Vision's Project Manager throughout the project. We request that the primary point-of-contact aims to respond to Vision inquiries within 48 hours in order to keep project schedule on track
- 5.3 Vision will provide basic analysis of the Customer's requirements in comparison with the Software to identify gaps in functionality and guide the initial configuration of the Software. Vision has no duty to provide any analysis of the Customer's



business processes; however, Vision may provide suggestions to Customer with regard to the Customer's business processes as Vision performs its work.

- 5.4 Vision and Customer will identify a mutually agreeable schedule for regular project status check-ins to share information and feedback in the spirit of adhering to the scheduled milestones outlined in Exhibit A.
- 5.5 Decisions made and/or approvals granted by Customer's primary point-of-contact will be maintained in the event of a change in primary point-of-contact, with the goal of eliminating re-work by either party.

6 Installation Services

- 6.1 Subject to Customer making available to Vision appropriately configured and located hardware in a safe environment, Vision will install the Software on the Designated Hardware.
- Vision has provided the Vision 8 Hardware and Software Specifications document to Customer. Customer is responsible for preparing an adequate environment to install Vision 8. If a suitable hardware environment is not available on the scheduled installation date, Vision will install Customer's software on Vision Cloud, which will be billed at the then-current annual rate.

7 Conversion Services

- 7.1 Vision will convert the following data from the Customer's legacy software:
 - a) For the database containing information from the current year and five historical years, Vision will convert names, addresses, property characteristics and sketches for residential and commercial properties.
 - b) For the remaining years as are stored in the Customer's legacy CAMA software, Vision will convert assessment history and ownership transfer history.
- 7.2 The Customer agrees to comply with following requirements to facilitate the conversion process. The Customer's failure to comply may result in an adjustment to the timing of deliverables or incur additional cost:
 - a) Upon Vision's request, Customer will provide to Vision the Customer's data dictionary (i) in an ASCII file format along with an unambiguous file layout for sketches, (ii) as database files in Oracle or SQL format, or (iii) in any other manner acceptable to Vision.
 - b) For sketches, the Customer must provide sketch data in a non-proprietary traverse format which shows "pen" movements for each sketch shape, and also links each shape to its associated sketch label. The data shall also include pointers from which Vision can derive the spatial relationship between shapes. It is the Customer's responsibility to provide the sketch data in a format that the Software can read or understand, or easily electronically convert. This may require the Customer to seek assistance from the legacy system vendor.
 - c) Prior to the commencement of conversion services, Customer will deliver a complete set of data files to Vision by internet file transfer protocol (FTP). Vision charges an additional fee on a time-and-material basis for any Customer data which Vision needs to pull from the Customer. A complete data set includes all files, sketches, photos and associated documents.
 - d) Vision will perform one beta and one live electronic conversion of Customer's real estate file. Any changes made to the legacy system after the live electronic data is submitted to Vision are the Customer's responsibility. Only a live conversion will be completed on historical real estate files. It is Customer's responsibility to provide the live electronic database in the same format as the beta database supplied during the beta conversion. Conversion of Personal Property information is not included in this SOW.
 - e) Customer will run a full recalculation of each database prior to installation. All errors reported in the recalc error log are to be corrected prior to delivery of files to Vision.
 - f) Parcels which encounter a value change will be placed on "value override" within the Software.
 - g) Customer is responsible for the quality of the data it provides to Vision. Incomplete files, erroneous data, or data which is otherwise unsatisfactory for conversion which leads to rework by Vision will be an additional charge and may also impact the project timeline.
 - h) Customer will provide consistent parcel information. Vision will notify Customer of any discrepancies found and will make a reasonable attempt to correct errors, where feasible. Vision will provide a list to Customer of any uncorrected data that is incomplete or contradictory.



- i) It is the Customer's Responsibility to convert customer Marshall & Swift data into Vision database, Vision does not convert Marshall & Swift data into the Marshall & Swift module.
- j) For data conversion of multi-year databases, the same schema data layout, code tables and data content that existed for the current year database conversion must exist in the same format in all the prior year history databases to be converted. Historical conversions assume re-use of primary conversion routines developed to convert the live Customer data. Vision reserves the right to revisit pricing and/or conversion timing of historical databases should their structure warrant significant changes to the primary conversion routines.
- 7.3 Vision agrees to commence installation and data conversion according to a mutually agreed upon timeline between the Parties. Both Vision and Customer understand and agree that any predetermined dates and/or schedules as they relate to the conversion of data will be adjusted to reflect the actual date of commencement. Any delay in the Customer's provision of any required information or documentation to Vision will automatically extend deadlines by at least a number of business days equal to the number of business days attributable to the Customer's delay.
- 7.4 Vision does not guarantee that calculated values in the Customer's legacy system will match calculated values in the Software after conversion.
- 7.5 At the Project Manager's best judgement and as a value-added service, Vision will partner with Customer to create a foundation for valuation as part of the conversion.
 - a) This value-added service may include, at the sole discretion of the Project Manager and dependent on the legacy data set: inclusion of legacy rates/factors that can be directly electronically converted; inclusion of a cost model foundation based on unique client fields and picklists present at time of conversion and/or inclusion of default sketch rates, base rates, outbuilding & extra feature rates, or land curves completed by the client during mapping.
 - b) Vision will conduct up to three "Valuation Workshops" to guide Customer through base model enhancement. This workshop process is designed to deliver immersive training on the Vision calculation engine and provide a Customer-driven value base.
 - c) Customer acknowledges that all of the above are best efforts by the Vision implementation team and are dependent on the quality of the legacy data and the responsiveness of the Customer and will not withhold payment for said value-added services. Costs for additional out-of-scope valuation services are included in Section 12 'Optional Services.'

8 Import / Export Development

- 8.1 As part of this SOW, Vision is providing one custom export to the current Tax system.
- 8.2 Vision will provide one additional custom tax export should Customer implement a new Tax system before December 30, 2025.
- 8.3 Vision will provide the Vision standard Building Permit Import with no modifications.
- 8.4 Vision and Customer will collaborate on developing clear specifications for each additional custom import/export. Changes to these specifications that result in additional work may require additional Fees.
- 8.5 Any additional imports or exports will be charged at Vision's then-current rates as a separate Change Order to this Statement of Work.

9 Mobile Integration

- 9.1 As part of this SOW, Vision will provide transition services of the City of Norfolk MobileAssessor module to Vision 8 for existing Mobile Module field and admin console users.
- 9.2 Vision will engage the services of a Subcontractor, Data Cloud Solutions, a Woolpert Company ("DCS"), to provide the mobile module transition services. All Support services will continue to be provided by DCS. If DCS is no longer able to provide all or part of the services, Section 9 of the SOW may be terminated upon 30 days written notice by Vision to Customer, without terminating any other portion of this SOW.
- 9.3 The mobile module transition services will not begin until receipt of the final payment for CAMA implementation in Section 11.e.
- 9.4 Vision will not be providing licenses to or support of the DCS mobile system as part of this SOW.

10 Training Services

10.1 The quantity of training to be provided is as follows:



- a) Eight (8) days of general user training and two (2) days of Administrator training provided at Customer's location, and four (4) additional days of Virtual "Refresher" Training to be used as needed.
- 10.2 If training days are not used immediately after go-live, they will be banked for future use in Customer's training day bank. Payment for milestones enumerated in Section 10 cannot be withheld for training scheduling.
- 10.3 The Customer will provide suitable facilities for training sessions according to Vision's requirements for effective knowledge transfer.
- 10.4 The Customer must give notice of any training session cancellation to Vision at least forty-eight (48) hours prior to the commencement of the training session.

11 Fees and Payments

- 11.1 In consideration of Vision's provision of the Software and Services to the Customer pursuant to this SOW and any attachments thereto, the Customer will pay to Vision Six Hundred Eighty-Seven Thousand Dollars (\$687,000.00) as itemized below:
 - a) 20% due upon signing
 - b) 20% due upon completion of initial database mapping
 - c) 20% due upon installation of beta conversion
 - d) 20% due upon installation of revised beta conversion
 - e) 20% due upon live database conversion
- 11.2 The above Fees are based on a parcel count of **72,900.** If this parcel count increases by more than 1,000, Fees are subject to change.
- 11.3 The Customer will make payment within 30 days of receiving an invoice.
- 11.4 Necessary travel and related incidental expenses will be invoiced monthly as incurred.
- 11.5 Customer will use its best efforts to adhere to its milestones as set forth in Project Schedule provided in Exhibit A. If scheduled milestones are missed by more than one (1) week due to delays caused by Customer, the project will be extended by the time period caused by the delay and Vision reserves the right to modify the dates of any subsequent milestones and increase the pricing of the project accordingly.
- 11.6 Vision is not providing any third-party licenses, and therefore this SOW does not include any license fees for third party products which can include but are not limited to MS SQL License, Microsoft Windows License, ESRI's ArcGIS, the Marshall & Swift Cost MVP Cost Calculators, JustAppraised, or other database software.
- 11.7 Vision shall use commercially reasonable efforts to provide the License Software and Services in accordance with the schedule set forth in Exhibit A, subject to any delays caused by the Customer or by *force majeure* events as provided in the agreement. Any delays caused by Vision will result in extension of the project at no cost to the customer.

12 Optional Services

12.1 Within one-hundred eighty days (180) of the signing of this SOW, and for the additional fees listed with each item below, the Customer may elect to add the following optional services. The fees for these optional services are subject to change.

a)	Taxpayer Website Hosting Services	\$12,500 / Year
b)	Annual Cloud Hosting Services (See Cloud Services Agreement)	\$24,750 / Year
c)	JustAppraised Deed Import License & Services	Priced Upon Scoping
d)	Additional Value Calibration Services: 20-Hour Block	\$10,000 / block
e)	Data Clean-Up Services	Priced upon scoping
f)	2-week Project Extension due to Customer delay	\$12,000
g)	Custom Property Record Card template (1 included free)	\$2,500
h)	Additional User Training	\$1,400 / day
i)	Additional Imports, Exports, or Reports	Priced upon scoping



j) Other Scope not included in COTS Vision 8

Priced upon scoping

13 Termination & Suspension

- 13.1 Customer may terminate this SOW upon thirty (30) days' prior written notice to Vision (the "Notice Period") in the event that Vision materially breaches this SOW and Vision has failed to cure such breach within such Notice Period.
- 13.2 Any termination of the Agreement shall result in the immediate termination of this SOW subject to the terms and conditions of the Agreement and this SOW.
- 13.3 The termination of this Schedule shall be without prejudice to any rights of either party against the other, and such termination shall not relieve either party of any of its obligations to the other accruing up to the time of termination including the Customer's obligation to pay any fees due.
- 13.4 Vision reserves the right to suspend the performance of Services under this SOW if the Customer fails to pay any fees that are unpaid after sixty (60) days of becoming due and upon 10 days' written notice to the Customer. During any such suspension, Services shall be restored once any outstanding fees have been paid in-full.

IN WITNESS WHEREOF, the Parties hereto have hereunto set their hands and seals as of their respective dates written below. Licensee: Licensor: City of Norfolk VA Vision Government Solutions, Inc 1 Cabot Road 810 Union St., Suite 303 Norfolk, VA 23510 Hudson, MA 01749 Signature Signature: By: By: Title: Title: Date: Date:



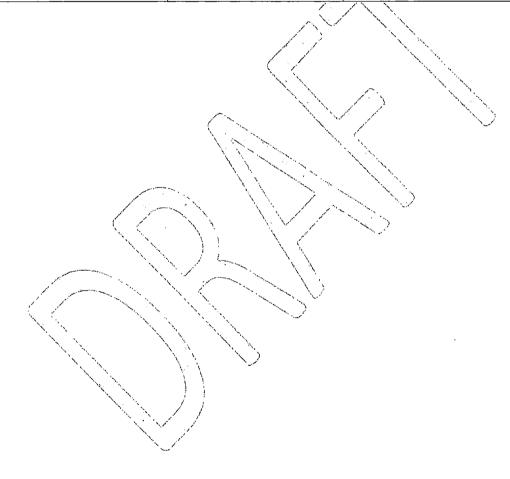
Exhibit A: Project Schedule

[DRAFT FOR REVIEW DURING CONTRACTING PHASE]

Milestone	Responsible Party	Schedule Requirements
Contract Negotiations Complete	City and Vision	February
Project Kick-Off	City and Vision	Schedule kick-off call immediately after contract signature
Community Supplies Information to Vision, including Non-Proprietary Legacy Sketch Data	City	+ 2 weeks
Data Mapping for Conversion	Vision	+ 9 weeks
Beta Conversion	Vision	+ 7 weeks
Beta Conversion Delivery	Vision	+ 1 day
Beta Conversion Review and Feedback	City	+ 3 weeks
Revised Beta Conversion with Value Foundation, per Previously Identified Revisions	Vision	+ 4-6 weeks, depending on workload required from revisions
Install Revised Beta Conversion	Visjon	+ 1 day
Revised Beta Conversion Review and Approval	City	+ 1 week
Supply Live Legacy Data	City	+ 1 day
Convert Live Legacy Data	Vision	+ 2 weeks

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Install Live Converted Data	Vision	+ 1 day
Supply Historical Database	City	+ 0 days
Convert Historical Databases	Vision	+ 2 weeks per database
Install Historical Databases	Vision	+ 1 day
Schedule and Execute Training	City and Vision	Post live install, at mutual convenience



SOFTWARE MAINTENANCE SERVICES SCHEDULE

This Maintenance Services Schedule ("Schedule") is made part of the Master Software License and Services Agreement by and between Vision Government Solutions, Inc., a Massachusetts corporation with its principal place of business at 1 Cabot Road, Hudson, Massachusetts 01749 ("Vision") and City of Norfolk, Virginia, ("Customer"). Vision and Customer may be collectively referred to as "Parties" or individually as a "Party."

WHEREAS, Vision is willing to support, and Customer desires for Vision to support, such Software as described below, on the terms and subject to the conditions set forth herein.

NOW, THEREFORE, in consideration of the foregoing premises and of the conditions and mutual covenants contained herein, and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the Parties hereto agree as follows:

1 Definitions

- 1.1 All capitalized terms used herein shall have the meanings attributed to them within the Agreement unless otherwise noted.
- 1.2 "Business Hours" shall mean 8:30am to 4:30pm Eastern Standard Time, Monday through Friday, Vision holidays excluded.

2 Term and Automatic Renewal

2.1 The term of this Maintenance Schedule shall commence upon the execution of this Agreement, then continue for one (1) year from the earlier of install date or November 1, 2022 ("Initial Term"). Thereafter, the term will continue with automatic renewals for additional successive one (1) year periods, unless written notice of non-renewal is delivered by either Party to the other not less than thirty (30) calendar days prior to the expiration date of the then-current term ("Renewal Term"). Both the Initial Term and any Renewal Term may be referred to collectively as the "Maintenance Term."

3 Maintenance Services Provided

- During the Maintenance Term, upon and subject to the terms and conditions of the Agreement and this Schedule, Vision will provide to Customer during Business Hours reasonable operational support and assistance as described below in connection with the use of the Software:
 - a) Corrections to the Installed Software and Documentation of Defects reported by Customer to Vision, which Defects are caused by errors in the then-current release of the Installed Software, provided that such Defects are reported to Vision no later than two (2) business days after the Defect first occurs or arises.
 - b) Telephone or email support with respect to the Services delineated in Sections 3.1(a) hereof.
 - c) Vision's obligation to provide a response pursuant to this Section 3.1 is void if the Customer does not allow reasonable access to the Installed Software for diagnostics and examination, or in the event of causes beyond the control of Vision, including but not limited to acts of God, fire, flood, strike, national emergency or failures of communications facilities or lines.
- 3.2 Vision shall use commercially reasonable efforts to respond to any request for support hereunder within one (1) business day of receiving such request.
- 3.3 Notwithstanding anything herein to the contrary, the Services to be provided hereunder shall not be covered by this Schedule, and shall be provided (if at all) on a time and materials basis, if the Software malfunctions due to or generates a Defect from:
 - Acts of God or natural disasters, including but not limited to fire, smoke, water, earthquakes, lightning or static electricity;

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- b) Causes external to the Software such as, but not limited to, electrical power fluctuations or failures, lack of air conditioning or proper temperature control, accidents, burglary or vandalism;
- c) The neglect, misuse (including faulty repair or maintenance by Persons other than Vision), or improper storage of the Software or the Designated Hardware on which the Software is installed, or other failure to comply with the instructions set forth in the Documentation or provide a suitable environment for the Installed Software;
- d) A modification or alteration of the Software not provided by Vision;
- e) A malfunction of any equipment not provided by Vision with which the Software is used or combined;
- f) Use of the Software in a manner for which it was not designed; or
- g) The failure of Customer to back-up its data or otherwise to fulfill any obligation under this Schedule or the Agreement, for the Installed Software supported hereunder.
- 3.4 This Schedule further shall not apply to, and the Services shall not be deemed to include:
 - a) Development or engineering of the Software, unless Vision shall deem such development or engineering necessary in its providing services under section 3.1 above;
 - b) Upgrades, customizations or other enhancements to the Software or Installed Software;
 - c) Supplies, accessories, media or other materials which are, by their nature, expendable or consumable, except for media which may be provided as part of the Services described in section 3.1 above;
 - d) Any services, including, without limitation, installation, alterations, modifications, maintenance or removal of, or relating to any item not furnished by Vision, and
 - e) Any services related to work external to the Software, including, without limitation, electrical work, cable routing or changes that affect the Specifications or the Customer's equipment and other software.

4 Warranty

4.1 The Services Warranty as described within the Agreement shall be the exclusive warranty governing the Services provided within this Schedule.

5 Customer Responsibilities

- 5.1 Customer shall install and maintain, at its expense, hardware (including without limitation a central processing unit, local area network or network server) and communication equipment (including, without limitation, modem and remote access) that is compatible with the Software and that meets Vision's minimum hardware configuration requirements.
- 5.2 Customer shall ensure that the environment, space and access to and availability of power comply, at all times, with Vision's minimum space and suitability requirements. Customer shall ensure that Vision has full, free and safe access to the Software and Customer's facilities and equipment for purposes of fulfilling its obligations hereunder. Customer shall provide (a) (i) media (tapes, floppy disks and/or disk packs), (ii) supplies, (iii) a current back-up of the current version of the Software, (iv) data, the use of hardware and/or other equipment, (v) other software, communications facilities, and (vi) other materials (other than tools) required to maintain and/or test the Software; (b) reasonable secure storage for such Customer-provided materials; and (c) reasonable secure storage for such equipment and tools as Vision elects to store at Customer's premises.
- 5.3 Customer shall back-up all files each day according to industry accepted standards. Vision shall not be responsible for, or be liable with respect to any loss of or damage to Customer data from failure of Customer to back-up its files or otherwise.
- 5.4 Customer shall bear sole responsibility to correct problems or Defects in compatibility between the Software and the Designated Hardware or other software resulting from modifications of the Software, Designated Hardware and such software by any Person other than Vision.



6 Fees and Payments

6.1 The fee for the Services performed hereunder during the Initial Term shall be as follows for each maintained Software product subject to this Schedule ("Initial Fees"):

Appraisal Vision 8 CAMA Software (27 Full Access and 20 Read Only Users):

a) Year One (1): Fifty-Four Thousand Seven Hundred Fifty Dollars (\$54,750.00)

[Should the City elect for taxpayer website hosting or other annual maintenance services, those services will be added here during the contracting phase]

[Should the City prefer a multi-year agreement, we can adjust discuss during the contracting phase].

- 6.2 The Initial Fee shall be due and payable upon the earlier of install date or November 1, 2022 and must be paid in full prior to the commencement of Services hereunder.
- 6.3 The Initial Fee shall be fixed as set forth in this Schedule for the Initial Term. However, the fee for any Renewal Term ("Renewal Fee") after the first shall be as determined by Vision, which shall give Customer notice thereof not less than thirty (30) days prior to the expiration of the then-current Renewal Term.
- 6.4 Any Renewal Fee hereunder shall be due and payable in full not later than two (2) business days prior to the commencement of such Renewal Term.
- 6.5 Customer agrees to pay for Services provided at Customer's request that are not covered by, or are expressly excluded from this Schedule within thirty (30) days of receipt of an invoice at Vision's then-current prices.
- 6.6 With Customer's prior approval and if travel is necessary to perform the Services herein described, Customer shall pay to Vision, within thirty (30) days of receipt of an invoice, all reasonable out-of-pocket expenses incurred by Vision in performing the Services for Customer under this Agreement, including but not limited to expenses for travel, meals, lodging and parts.

7 Termination; Suspension of Service

- 7.1 Either party shall have the right to terminate this Agreement upon thirty (30) days written notice to the other Party.
- 7.2 Vision reserves the right to suspend the performance of Services under this Schedule if the Customer fails to pay any fees that are unpaid after ninety (90) days of becoming due. During any such suspension, Services shall be restored once any outstanding fees have been paid in-full.
- 7.3 The termination of this Agreement shall be without prejudice to any rights of either party against the other, and such termination shall not relieve either party of any of its obligations to the other existing at the time of termination including the Customer's obligation to pay any fees due.



By signing below, each Party acknowledges that it has read this Schedule and the Agreement to which it is attached, understands them, and agrees to be bound by their terms and further agrees that they are the complete and exclusive statement of the agreement between the Parties, which supersedes and merges all prior proposals, understandings, and all other agreements, oral or written, between the Parties relating to the subject matter of this Schedule. This Schedule may not be modified or altered except by a written instrument duly executed by both Parties.

FURTHER, each Party has full power and authority and has been duly authorized to enter into and perform its obligation under this Schedule, including Customer's authority to enter into an agreement of this scope and duration, all necessary approvals having been obtained. The execution, delivery and performance of this Schedule by each Party shall not violate, create a default under or breach of any charter, bylaws, agreement or other contract, license, permit, indebtedness, certificate, order decree or security instrument to which such Party or any of its principles is a Party or subject to.

In witness whereof, the Parties hereto have hereunto set their h	ands and seals as of their respective dates written below.
Customer: City of Norfolk VA 810 Union St., Suite 303 Norfolk, VA 23510	Vision: Vision Government Solutions, Inc. 1 Cabot Road Hudson, MA 01749
Signature:	Signature:
Ву:	Ву:
Title:	Title:
Date:	Date:



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MASTER SOFTWARE LICENSE AND SERVICES AGREEMENT

This Master Software License and Services Agreement ("Agreement") is made and entered by and between Vision Government Solutions, Inc., a Massachusetts corporation with its principal place of business at 1 Cabot Road, Hudson, Massachusetts 01749 ("Licensor" or "Vision") and City of Norfolk, Virginia ("Licensee"). Licensor and Licensee may be collectively referred to as "Parties" or individually as a "Party."

WHEREAS, the Licensor has developed and owns, or has the right to use and/or license, certain software and related documentation that Licensee desires to use; and

WHEREAS, Licensor is willing to grant a license to Licensee to use, and Licensee desires to use, such software and related documentation, on the terms and subject to the conditions set forth herein.

NOW, THEREFORE, in consideration of the foregoing premises and of the conditions and mutual covenants contained herein, and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the Parties hereto agree as follows:

1 Definitions

- 1.1 "Defect" shall mean reproducible errors in the Software which prevent the Software from performing in all material respects in accordance with the Documentation, when operated in the proper environment and used in accordance with all applicable instructions.
- 1.2 "Designated Hardware" shall mean the central processing unit (CPU), local area network, or network server or other hardware specified or permitted by Vision designated by the Licensee and in compliance with any known required specifications, and if applicable, the number of users set forth on the applicable Schedule or other addendum attached hereto and made a part hereof. The Designated Hardware may include mobile devices and annexed hereto. "Documentation" shall mean the user documentation describing the Software and providing guidelines for its use, and any and all additions and updates thereto provided to Licensee by Licensor, and any portion of the foregoing.
- 1.3 "Enhancement" shall mean collectively any modification, addition, or change to the Software that provides error corrections or efficiency alterations to the Software, designated as such in Licensor's sole discretion. Enhancements are provided by Licensor to Licensee under this Agreement and/or pursuant to an applicable Schedule or other addendum, without an additional charge as part of warranty or maintenance Services, provided that Licensee has not breached this or any other Agreement between Licensor and Licensee. Enhancements are delivered to the Licensee as part of a software release.
- 1.4 "Installed Software" shall mean the specific Software being licensed to Licensee by Licensor as specified on any applicable Schedule, without regard to the method by which Licensee accesses such Software.
- 1.5 "License" shall mean the license granted hereby to the Licensee by the Licensor for the Software.
- 1.6 "Location" shall mean the permitted location for the Designated Hardware, as listed on the applicable Schedule(s) annexed hereto and made a part hereof.
- 1.7 "Module" shall mean a dependent software program that works with the Software but provides separate and optional functionality, which may be offered to Licensee for an additional charge.

- 1.8 "Person" shall mean any individual, partnership (general, limited or otherwise), limited liability company, corporation, joint venture, trust, trustee, unincorporated association, proprietorship or other legal entity, or any government, agency or subdivision thereof.
- 1.9 "Prices" shall mean the then-current list prices of Licensor for Software or Services. The price list in effect on the date of this Agreement may be annexed hereto as an applicable Schedule.
- 1.10 "Schedule" shall mean any additional document that is attached hereto, made a part hereof and incorporated into this Agreement by reference, that is executed by both Parties.
- 1:11 "Services" shall mean all the conversion, support, update, modification, installation, implementation, maintenance, consulting, training or other services provided to Licensee by Licensor or any designee of Licensor, pursuant to this Agreement and any applicable Schedule.
- 1.12 "Software" shall mean the Installed Software and any and all Enhancements and Upgrades, custom and other software hereafter provided to or obtained by Licensee pursuant to this Agreement, any other agreement between Licensee and Licensor, whether in object code, source code or any other form, and any portion of the foregoing. The Software may be further defined in any applicable Statement of Work.
- 1.13 "Statement of Work" shall mean a specific type of Schedule that specifies, among other things, the Software and Services being purchased and/or licensed by Licensee, and the number of users authorized to use the Software.
- 1.14 "Upgrade" shall mean collectively any significant modifications or changes to the Software which provides new or different functionality and/or interoperability, designated as such in Licensor's sole discretion as a new software version. Upgrades are provided by Licensor to Licensee pursuant to an applicable Schedule. Licensor allocates or charges separate or additional consideration for Upgrades.
- 1.15 "Warranty Period" shall mean the 30-day period from the later of shipment or delivery to Licensee of the Installed Software, unless a different period is specified on an applicable Statement of Work regarding such Installed Software.



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2 License Grant and Restrictions

- 2.1 General. The Licensor represents that it has the right to grant the License hereunder. The Installed Software and its related Documentation are licensed, not sold, to Licensee for use only under the terms of this Agreement.
- 2.2 <u>License Grant</u>. Upon and subject to the terms and conditions of this Agreement, Licensor grants to Licensee, and Licensee accepts, a non-transferable, limited, non-exclusive license to: (i) use the Installed Software in object code form as limited below and by any applicable Schedule; (ii) use the Installed Software only for Licensee's internal business needs; and (iii) use the Documentation to support the use of the Installed Software and/or Service(s). All rights not expressly granted hereunder shall be reserved to Licensor. Additionally, Licensee shall not, sublicense, sell, rent, transfer, distribute or otherwise commercially exploit or make the Software or Documentation available to any third-party. Licensee and all of its users who have the right to use the Installed Software on behalf of Licensee under this Agreement, will be bound and comply with this Agreement.
- 2.3 Restrictions. Licensee shall not, directly or indirectly (i) reverse 3.2 engineer, decompile or disassemble the Software, or otherwise attempt to derive the source code of the Software, or any portion thereof; (ii) make more copies of the Software and the Documentation than is specified in this Agreement or allowed by applicable law, despite this limitation; (iii) publish or otherwise display the Software and/or the Documentation, including any screenshots of the Software, for others to copy; (iv) modify or create a derivative work of any part of the Software or Documentation; (v) use the Software other than as, or for any purpose other than that, set forth in the Documentation or in any application that may involve risks of death, personal injury, severe property damage, or environmental damage; (vi) file copyright or patent applications that include the Software or Documentation or take any other action that may transfer any intellectual property rights in the Software or the Documentation to any Person other than Licensor; and/or (vii) permit a competitor of Vision to use or view the Software and/or Documentation without Vision's expressed written permission. The Licensee recognizes that the Software and/or Documentation is itself proprietary information and shall use at least the same degree of care as it uses to protect its own proprietary information of similar kind, but in no event shall such care be less than commercially reasonable, so as to protect the Software and Documentation without limiting the generality of the foregoing.
- 2.4 <u>Provision of Installed Software</u>. Licensor shall provide to Licensee (i)(a) the object code for the Installed Software or (b) remote access to the Installed Software and (ii) Documentation for the Installed Software. Maintenance is available only pursuant to a separate Schedule that may be attached to this Agreement.
- 2.5 <u>Locations</u>. In the event Licensee receives the object code for the Installed Software (rather than remote access thereto) Licensee shall use the Installed Software only on the Designated Hardware and at the Designated Location(s). Licensee shall have the right to change the Location of the Designated Hardware and to upgrade

the Designated Hardware to use the Installed Software on a central processing unit that replaces the Designated Hardware. In no event shall Licensee have the right to use or permit the use of the Installed Software simultaneously on more than one central processing unit in excess of the permitted number of users as set forth on the applicable Schedule.

3 Protection of Proprietary Rights

- 3.1 Proprietary Rights. Licensee acknowledges that the Software and Documentation have been and shall be developed by Licensor at great expense to Licensor, that the Software and Documentation are proprietary to Licensor and that Licensor has, and shall have and retain, full title, ownership, proprietary and other intellectual property rights in the Software and Documentation, including without limitation, copyright, trademark, service mark, trade secret, trade name and other intellectual property rights (collectively the "Proprietary Rights"). Further, Licensee acknowledges that the Software is designed as a standard product and not as a customized product created exclusively for the Licensee.
- Licensee's Rights. Licensee acknowledges that the rights granted to Licensee hereunder are only the rights of a Licensee. Licensee acknowledges and agrees that: (i) no title or ownership of the Software or Documentation is transferred to Licensee hereby; (ii) the Software and Documentation and all Proprietary Rights are, and shall remain, the exclusive property of Licensor (or its licensors); and (iii) except for the License granted in Section 2 above, Licensee shall not have any right, title or interest in the Software or Documentation. Licensee shall not make any claim or representation of ownership, or act as the owner, of any of the Software or Documentation. Licensee agrees not to remove, change or deface, and shall include, Licensor's copyright notice and notice of its Proprietary Rights on each and every item of Software copied or reproduced.
- 3:3 <u>Licensor's Rights</u>. Licensor acknowledges that it has no right to or interest in the data processed by Licensee using the Software, except that of limited use (i) to install, implement and maintain the Software, and (ii) for commercial purposes for that data deemed a public record pursuant to the laws and regulations of the applicable federal and state jurisdictions governing the disclosure of public records.
- other information of Licenser shall keep confidential the Software and other information of Licensor which is confidential, proprietary or nonpublic ("Confidential Information") and shall not disclose the Confidential Information to any Person, except to employee(s) of Licensee with a need to know the Confidential Information in order for Licensee to perform its obligations under this Agreement. Confidential Information shall not include information which (i) is in the public domain at the time of disclosure or enters the public domain through no act or omission of Licensee, (ii) Licensee's written records in existence at the time of disclosure, (iii) is freely disclosed to Licensee, without restriction, by a third party without a duty of confidentiality to Licensor, and (iv) Licensee's written records show to have been developed

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- independently by Licensee by personnel without access to the Confidential Information.
- 3.5 Notification of Unauthorized Use. Licensee shall promptly notify Licensor upon becoming aware of the possession, use, or knowledge of any Confidential Information by a Person not authorized by this Agreement to have such possession, use or knowledge. Licensee shall promptly furnish to Licensor full details of such possession, use or knowledge and shall use reasonable efforts to cooperate with Licensor, at Licensor's expense, in any action taken or deemed necessary by Licensor to protect the Confidential Information or Proprietary Rights.

4 Warranties

Software Warranty. Licensor warrants to the Licensee that the Installed Software shall operate in all material respects in accordance with its Documentation for duration of the Warranty Period ("Software Warranty"). Licensee's exclusive remedy and Licensor's exclusive obligation for any breach of this Software Warranty shall be the correction of Defects or replacement by Licensor of the nonconforming portion of such Installed Software, at Licensor's sole election. The failure of Licensee to notify the Licensor within the Warranty Period of the failure of the Installed Software to conform to the Documentation therefor shall relieve Licensor of its obligations and liabilities under this section of this Agreement. Licensee's notice shall disclose the items within the Documentation to which such Installed Software fails to conform and the manner in which the Installed Software fails to conform with sufficient specificity to permit Licensor to reproduce and correct such nonconformity. In the event Licensor determines, in its sole discretion, that it cannot, using commercially reasonable efforts, correct a Defect or replace such nonconforming portion of the Installed Software, Licensee may return the Installed Software and Documentation and receive a refund of the License fee paid hereunder. Licensee's right to return the Installed Software and Documentation and receive a refund hereunder shall expire at the expiration of the Warranty Period. This Software Warranty shall be null and void upon, and shall not apply to any Defect or nonconformity caused by (i) any modification or alteration of the Software or Licensee's equipment other than by or with prior approval of Licensor, (ii) misuse or abuse of the Software or Documentation, (iii) negligence or wrongdoing of Licensee in connection with the Software or Documentation, (iv) force majeure events as set forth in this Agreement, (v) malfunction of any of Licensee's equipment, or (vi) use of the Software or Documentation in any manner inconsistent with this Agreement or the Documentation therefor. Licensee shall pay Licensor at Licensor's then-current time and materials rates for its Services in the event Licensee makes a Software Warranty claim that is null and void or inapplicable hereunder. The Software Warranty does not apply to any portion of the Software, Documentation, supplies or materials which are, by their nature, consumable or expendable. The Warranty Period for Enhancements will run contiguously with the Software Warranty for the enhanced Installed Software, unless Licensor notifies Licensee that a longer Warranty Period applies upon delivery of the Enhancement to Licensee. The

- Warranty Period for Upgrades shall be as set forth in the Schedule or other agreement pursuant to which the Upgrade is provided.
- 4.2 <u>Services Warranty</u>. Licensor warrants that all Services will be performed in a professional and workmanlike manner, consistent with then-current industry standards ("Services Warranty"). Licensee's remedy for a breach of the Services Warranty will be, at Licensor's option, either to (i) re-perform such Service(s); or (ii) to provide Licensee a refund for the allegedly defective Service(s). Such remedy will only be available if Licensee notifies Licensor in writing within thirty (30) calendar days of the completion of such Service(s).
- 4.3 Warranty Exclusions; Exclusive Remedy. LICENSOR DOES NOT MAKE ANY, AND EXPRESSLY DISCLAIMS, ALL REPRESENTATIONS AND WARRANTIES, WHETHER ORAL OR WRITTEN, EXPRESS OR IMPLIED, OR ARISING BY USAGE OF TRADE OR COURSE OF DEALING, OTHER THAN THE WARRANTIES EXPRESSLY MADE IN THIS AGREEMENT, INCLUDING, WITHOUT LIMITATION, THE WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND NON-INFRINGEMENT. Licensor does not warrant that the Software will satisfy, or may be customized to satisfy, all of Licensee's requirements or that the use of the Software will be uninterrupted or error-free. The remedies set forth herein shall be the sole and exclusive remedies of Licensee.

5 Maintenance Services and Enhancements

- 5.1 Commencement of Maintenance Service. Licensee acknowledges that this Agreement includes certain warranties for the Installed Software and Services, and that these warranties are separate from any Installed Software maintenance service. The commencement date of maintenance service and whether or not the maintenance service period overlaps with any Warranty Period will depend on the maintenance service purchased by Licensor.
- Enhancements During Warranty. Licensor shall provide to Licensee during the Warranty Period, at no additional expense to Licensee, any correction or Enhancement provided by Licensor, as determined by Licensor in its sole discretion. After the expiration of the Warranty Period, Enhancements and Upgrades shall be available to Licensee as maintenance services, available for purchase pursuant to a maintenance Schedule. Enhancements and Upgrades shall also be available to licensees who have not purchased a maintenance Schedule and are not and have not been in breach of any agreement between such licensee and Licensor, on a time and materials basis, at Licensor's then-current terms and conditions, including Prices.

6 Limitation of Liability; Indemnification

6.1 <u>Limitation of Liability</u>. Licensor shall not be liable for any loss or damage that Licensee suffers or claims to have suffered other than, subject to the limitations set forth below, a loss or damage directly caused by Licensor's negligence or willful misconduct. Both Parties agree that Licensor has no liability whatsoever for Licensee's data or equipment.

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- 6.2 Exclusion of Consequential Damages. In no event will either Party be liable to the other for (i) incidental, consequential, indirect, special, punitive or exemplary damages, whether claimed under contract, tort or any other legal theory, including but not limited to loss of use, revenue or profit, or (ii) loss of or damage to Licensee data or programming, in either event whether or not such Party had notice of the possibility of such damages occurring or should have known of such possibility. Notwithstanding anything to the contrary set forth in this Agreement, Licensee and Licensor expressly agree that the maximum aggregate liability of Licensor for all claims under this Agreement or otherwise shall be the amount paid by Licensee to Licensor hereunder during the twelve months immediately preceding the event causing the loss or damage to Licensee. The representations and warranties made in this Agreement extend only to Licensee and its permitted successors and assigns. Any action against Licensor not brought within six (6) months after the cause of action accrues or arises shall be deemed barred.
- 6.3 Indemnification. Licensee shall, to the fullest extent permitted by applicable law, indemnify and hold harmless Licensor, its agents, employees, officers, directors, stockholders, successors and assigns from and against any and all liabilities, losses, damages, claims, suits and expenses, including, without limitation, reasonable attorneys' fees, of whatsoever kind and nature imposed on, incurred by, or asserted against Licensor, its agents, employees, officers, directors, stockholders, successors and assigns relating to or arising out of any failure on the part of Licensee to perform or comply with the terms of this Agreement.

7 Intellectual Property Indemnification

- 7.1 <u>Defense and Cooperation</u>. Licensor shall, at its own expense with counsel of its own choosing, defend any claim made against Licensee asserting that the Software infringes upon the United States patent or copyright rights of a third party; provided that Licensee provides immediate notice of such claim and Licensor has full control of such defense, the right to settle or compromise such claim and the incurring of any expense related thereto. Licensee shall fully cooperate with Licensor in any such defense.
- 7.2 Infringing Software. In the event of any claim described in Section 7.1 "Defense and Cooperation" above, or upon Licensor's determination that such a claim may occur, Licensor shall have the right, at its option, to (i) procure for Licensee the right to continue using that portion of the Software claimed to be infringing, (ii) require Licensee to cease using that portion of the Software claimed to be infringing and replace such portion with other software to make the Software non-infringing, or (iii) require Licensee to cease using that portion of the Software or Documentation claimed to be infringing and refund to Licensee a pro rata portion of the fee paid by Licensee for the License granted hereunder.
- 7.3 Failure of Notification. The failure of Licensee to notify Licensor of such claim shall relieve Licensor of its obligations and liabilities under this Section 7 "Intellectual Property." Licensor shall have no liability or obligation to Licensee under this Section 7 if any such claim is made by an affiliate of Licensee or is based

- upon, arises out of or results from (i) any product or information or data not provided by Licensor, (ii) the failure of Licensee to use Enhancements or Upgrades to the Installed Software, (iii) modification or alteration of the Software by a Person other than Licensor, (iv) misuse or abuse of the Software, (v) negligence or wrongdoing of Licensee or any malfunction, modification or alteration of Licensee's equipment, (vi) force majeure events set forth in this Agreement, or (vii) use of the Software in any manner inconsistent with this Agreement or the Documentation.
- 7.4 Exclusive Remedy. Section 7.1 "Defense and Cooperation" specifies the entire liability of Licensor and the exclusive remedy of Licensee with respect to any claim that the Software infringes the intellectual property rights of any third party or a breach of Section 2.1 "General" of this Agreement.

8 Term and Termination

- 8.1 Term. This Agreement shall commence as of the latter date of both Parties' signatures and continue until terminated, as set forth below.
- 8.2 <u>Termination at End of Term.</u> Either Party hereto shall have the right to ferminate this Agreement as it relates to the Services purchased under this Agreement at the end of any applicable specified term listed within an applicable Schedule upon thirty (30) days' written notice to the other prior to the expiration of such term.
- Termination for Material Breach. Licensor shall have the right, upon ten (10) business days' notice to Licensee, to terminate this Agreement upon Licensee's breach of any of the terms and conditions of this Agreement or any other agreement between Licensor and Licensee and shall have the right to cease performance of its obligations hereunder, without notice, in the event Licensee breaches any of the terms and conditions of this Agreement or any other agreement between Licensor and Licensee. This Agreement shall automatically terminate in the event Licensee is unable to pay debts as they come due, enters into suspension of payments, moratorium, reorganization or bankruptcy, admits in writing its inability to pay debts as they mature, suffers or permits the appointment of a receiver for its business or assets, or avails itself of or becomes subject to any other judicial or administrative proceeding related to insolvency or protection of creditors' rights (and, if such action or proceeding is involuntary on the part of Licensee, such action or proceeding is not dismissed within sixty (60) days).
- 8.4 Effect of Termination. Immediately upon the termination of this License, for any reason, Licensee shall deliver to Licensor all copies in Licensee's possession of the Software and Documentation, in whatever form, shall destroy any copies of materials containing Confidential Information, and shall certify in writing under oath that all materials required to be delivered to Licensor or destroyed have been so delivered or destroyed.
- 8.5 <u>Obligations after Termination</u>. The termination of this Agreement shall be without prejudice to any rights of either Party against the other and such termination shall not relieve either Party of any of its obligations to the other existing at the time of termination.

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- Additional Remedies Due to Breach. Licensee acknowledges that, 10 General Provisions because of the confidential and proprietary nature of the Software, neither termination of this Agreement, nor arbitration, nor would an action at law be an adequate remedy for a breach by Licensee of Sections 2, "License Grant and Restrictions" and 3, "Protection of Proprietary Rights" of this Agreement. Accordingly, Licensee agrees and consents that in the event of such a breach, in addition to all other remedies which the injured Party may have, the injured Party shall be entitled to relief in equity, including a temporary restraining order, temporary or preliminary injunction and permanent injunction to restrain the continuation of any such breach or to compel compliance with the provisions of this Agreement.
- Surviving Sections. Notwithstanding anything to the contrary in this Agreement, 2.3, "Restrictions"; 3, "Protection of Proprietary Rights"; 6, "Limitation of Liability and Indemnification"; 7, "Intellectual Property; 8, "Term and Termination"; 9, "Payment and Prices"(to the extent incurred prior to termination); and 10, "General Provisions" shall survive expiration or earlier termination of this Agreement.

Payment and Charges

- Fees. Licensee shall pay to Licensor a fee in the amount set forth in the applicable Schedule(s) for the Installed Software, Documentation and or Services subject to this Agreement, ("Fees"). All initial license fees and installation charges shall be paid in full at the time of the installation of the Installed Software. Parts and supplies shall be provided to Licensee, when needed and as available, at Licensor's then-current terms, conditions and Prices, for as long as this Agreement is in effect and Licensee is not in breach hereof. Maintenance Services shall be provided as set forth in the applicable Schedule(s), upon/the terms and conditions set forth therein.
- 9.2 Taxes. In the absence of valid documentation certifying exemption to the following, Licensee shall pay when due, any 10.5 sales, use, excise, property, customs or other taxes, duties, tariffs or other assessments and related interest and penalties that Licensor may, at any time, become obligated to pay or collect in connection with or arising out of this Agreement, the License granted hereby or the Services to be provided hereunder (other than taxes based on Licensor's net income). In the event Licensor is required to and does pay any such amounts which Licensee is obligated to pay, Licensee shall, upon the request of Licensor, promptly reimburse Licensor an amount equal to the amount so paid by Licensor and any interest, penalties, costs and expenses paid or incurred by Licensor in connection therewith, in no event later than five (5) business days following receipt by Licensee of an invoice from Licensor therefor.
- Suspension of Performance. Failure of the Licensee to make payments when reasonably due under the terms of this Agreement shall entitle the Licensor, in addition to its other rights and remedies, to suspend further performance of the project.

- 10.1 Governing Law and Venue. This Agreement shall be governed by and construed under and pursuant to the laws of the Commonwealth of Massachusetts, exclusive of the laws relating to conflict of laws. Any dispute under this Agreement shall be heard and determined in any state or federal court sitting in the Commonwealth of Massachusetts, Eastern District, and each of the parties hereto hereby consents to the exclusive jurisdiction of such courts (and of the appropriate appellate courts therefrom in any such claim, action, suit or proceeding) and irrevocably waives, to the fullest extent permitted by applicable law, any objection that it may now or hereafter have to the laying of venue of any such claim, action, suit or proceeding in any such court or that any such claim, action, suit or proceeding that is brought in any such court has been brought in an inconvenient forum.
- 10.2 Entire Agreement. This Agreement and any Schedules, addenda and exhibits hereto, represent the entire and integrated agreement between the Licensee and Licensor and supersedes all prior negotiations and representations, either written or oral, with respect to the subject matter hereof and thereof. Where any conflict arises between this Agreement and other documents forming part of the Agreement, this Agreement shall control. This Agreement may not be released, discharged, changed or modified except by an instrument in writing signed by a duly authorized representative of each of the Parties hereto.
- 10.3 Headings. The headings and captions used in this Agreement are intended and shall, for all purposes, be deemed to be for convenience only and shall have no force or effect whatsoever in the interpretation of this Agreement.
- 10.4 Counterparts. This Agreement may be executed in two or more counterparts, each of which shall be deemed an original for all purposes hereunder and all of which, when taken together, shall be deemed one and the same instrument.
- Severability. If any term, clause or provision of this Agreement shall be judged invalid for any reason whatsoever by a court of competent jurisdiction, such invalidity shall not affect the validity or operation of any other term, clause or provision; and such term, clause or provision shall be deemed to have been modified to the extent necessary to make it valid and enforceable; or, if such term, clause or provision cannot be so modified, it shall be deemed deleted from this Agreement.
- 10.6 Notices. All notices. requests, demands and other communications required or permitted under this Agreement shall be deemed to have been duly given and made, if in writing and served either by personal delivery or facsimile to the Party for whom it is intended or by being delivered postage prepaid, certified or registered mail, return receipt requested (or such form of mail as may be substituted therefore by postal authorities), in the United States mail, or with Federal Express or similar courier service, bearing the address shown in this Agreement or such other address as may be designated in writing thereafter by such Party. The addresses used to give such notices are as stated below.

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- 10.7 <u>Enforcement Expenses</u>. Licensee shall pay all costs and expenses of Licensor including, without limitation, reasonable attorneys' fees incurred by Licensor in the enforcement by Licensor of its rights hereunder.
- 10.8 No Waiver. The failure of Licensor to enforce at any time any of the provisions of this Agreement or the failure to require, at any time, performance by Licensee, of any of the provisions of this Agreement shall in no way be construed to be a present or future waiver of such provisions and shall not in any way affect the right of Licensor to enforce each and every such provision thereafter. The express waiver by Licensor of any provision, condition or requirement of the Agreement shall not constitute a waiver of any future obligation to comply with such provision, condition or requirement.
- 10.9 <u>Cumulative Rights</u>. All rights and remedies conferred under this Agreement or any other instrument or law shall be cumulative and may be exercised singularly or concurrently.
- 10.10 Force Majeure. Licensor will not be liable for any failure or delay in performing services or any other obligation under this

- Agreement or for any damages suffered by Licensee or an end user by reason of such failure or delay, which is, indirectly or directly, caused by an event beyond Licensor's foreseeable control but not limited to strikes, riots, epidemics, pandemics, shelter in place or stay at home orders, natural catastrophes, terrorist acts, governmental intervention or advisories, or other acts of God, or any other causes beyond Licensor's reasonable control.
- 10.11 Authority. Each Party has full power and authority and has been duly authorized to enter into and perform its obligation under this Agreement, including Licensee's authority to enter into an agreement of this scope and duration, all necessary approvals having been obtained. The execution, delivery and performance of this Agreement by each Party shall not violate, create a default under or breach of any charter, bylaws, agreement or other contract, license, permit, indebtedness, certificate, order decree or security instrument to which such Party or any of its principals is a party or subject to.

IN WITNESS WHEREOF, the Parties hereto have hereunto set their hands and seals as of their respective dates written below.

Licensee: City of Norfolk VA	Licensor: Vision Government Solutions, Inc.
810 Union St., Suite 303 Norfolk, VA 23510	1 Cabot Road Hudson, MA 01749
Signature:	Signature:
By:	Ву:
Title:	Title:
Date:	Date:



CLOUD SERVICES SCHEDULE

This Cloud Services CAMA Software Schedule ("Schedule") is made part of the Master Software License and Services Agreement by and between Vision Government Solutions, Inc., a Massachusetts corporation with its principal place of business at 1 Cabot Road, Hudson, Massachusetts 01749 ("Vision") and City of Norfolk, Virginia ("Customer") (the "Agreement"). Vision and Customer may be collectively referred to as "Parties" or individually as a "Party."

WHEREAS, Vision is willing to provide, and Customer desires to utilize Vision's Cloud Computing Service, on the terms and subject to the conditions set forth herein.

NOW, THEREFORE, in consideration of the foregoing premises and of the conditions and mutual covenants contained herein, and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the Parties hereto agree as follows:

1 Definitions

- 1.1 All capitalized terms used herein shall have the meanings attributed to them within the Agreement unless otherwise noted.
- 1.2 "Cloud Computing Service" shall mean any Service provided by Vision that allows Customer to access their data or software on Vision server(s).
- 1.3 "User" or "CAMA User" shall mean an employee of the Customer that was granted access to Customer's Vision 8 CAMA Database by the customer.
- 1.4 "Vision Server(s)" shall mean any server that is owned or licensed to Vision and made available to clients by Vision.

2 Hardware, Software, Services and Terms

- 2.1 Vision will provide sufficient space on Vision Server(s) for client's Vision 8 CAMA Database and Associated Documents.
- 2.2 Vision will install Client's Vision 8 CAMA database obtained and converted under CAMA Software Statement of Work (SOW) Agreement.
- 2.3 The terms and fees included in this Cloud Services Agreement are in addition to the terms and fees outlined in the SOW agreement, Annual Maintenance Agreement and Web Portal Public Access Agreement.
- 2.4 Vision will install all required server software including SQL.
- 2.5 Vision will set-up and configure 30-day rolling nightly backups of the CAMA Data and appropriate system files.
- 2.6 Customer will remain responsible to maintain their local intranet in good working order.
- 2.7 Customer will remain responsible to provide internet access with sufficient band width to all CAMA users.

3 Term and Automatic Renewal

3.1 The term of this Schedule shall commence upon the later of (i) the installation of Vision 8 or (ii) the execution of this Schedule and shall continue for one (1) year ("Initial Term"). Thereafter, the term will continue with automatic renewals for additional successive one (1) year periods, unless written notice of non-renewal is delivered by either Party to the other not less than sixty (60) calendar days prior to the expiration date of the then-current term ("Renewal Term"). Both the Initial Term and any Renewal Term may be referred to collectively as the "Term."

4 Warranty

4.1 The Services Warranty as described within the Agreement shall be the exclusive warranty governing any Services provided within this Schedule.

5 Project Implementation Services

- 5.1 Vision shall provide installation instructions to install the necessary local interfaces to access the Software and Services. Vision shall provide assistance with the installation process as needed.
- 5.2 Customer shall promptly, upon completion of such installation, test the Installed Software using its data and notify Vision of any Defects or deficiencies.
- 5.3 Customer shall commence installation at its convenience once Vision has released to it the instructions for installation.

6 Customer Support

- 6.1 During the Term, upon and subject to the terms and conditions of the Agreement, the CAMA Software Statement of Work (SOW), and this Schedule, Vision will provide to Customer during Business Hours reasonable operational support and assistance as described in the Software Maintenance Agreement.
- 6.2 Vision shall use commercially reasonable efforts to respond to any request for support hereunder within one (1) business day of receiving such request. Vision strives for uptime of 99.9%.

7 Security

- 7.1 The Customer must keep confidential any of its passwords associated with the Software and Services. In addition, Customer must secure the hardware upon which the Software will be accessed using, antivirus software, malware protection software, or similar software protecting against malicious software, computer viruses, hijacking, or other offensive attack. A failure to adhere to the preceding statements will undermine Vision's efforts for securing the Customer's data stored on Vision's servers.
- 7.2 Vision's hosted solution includes nightly backups, firewalls, IP whitelisting, anti-virus / malware scanning, and user access restrictions and permissions.



8 Customer Restrictions and Responsibilities

- a) Customer is authorized to access and utilize Vision Servers to:
 - (1) Access, view, edit, maintain or otherwise utilize their CAMA data and Associated Documents
- b) Customer will not install or access any software or programs on Vision Servers without prior written approval from Vision.
- c) No 3rd Party access is allowed under this agreement. Customer will get prior written approval for all consultants, agents and other non-employee personnel that are requesting access to Vision Servers. Additional fees may be charged if Vision is required to grant access to any third parties, or if customer violates this provision.
- d) Customer will not utilize Vision Server(s) to access the internet without prior written approval, other than indirect internet access through the CAMA UI.
- e) Customer will ensure that its content will not violate any applicable law. Customer is solely responsible for the development, content, operation, maintenance, and use of its Content.
- f) We may suspend Customer's right to access or use any portion or all of the Service Offerings immediately upon notice to Customer if Vision determines:
 - (1) Customer use of Vision Service Offerings:
 - (a) Pose a security risk to the Service Offerings or any other customer,
 - (b) Could adversely impact Vision systems, the Service Offerings or Content of any other customer,
 - (c) Could subject Vision, our affiliates, or any other customer to liability, or
 - (d) Could be fraudulent
 - (2) Customer is in breach of this Agreement
 - (3) Customer is in breach of its payment obligations under this agreement

9 Other Exclusions

- 9.1 Notwithstanding anything herein to the contrary, the Services to be provided hereunder shall not be covered by this Schedule, and shall be provided (if at all) on a time and materials basis, if the Software malfunctions due to:
 - a) A modification or alteration of the Software or Service not provided by Vision;
 - b) Use of the Software or Service in a manner for which it was not designed; or
 - c) The failure of Customer to fulfill any obligation under this Schedule or the Agreement.
- 9.2 The procurement of and costs associated with third party software licenses including but not limited to Microsoft Office Suite, ESRI, Marshall and Swift, etc. are excluded from this Schedule.



10 Fees and Payments

- 10.1 The fee for the Software and Services performed hereunder during the Initial Term shall be as follows ("Initial Fee"):
 - a) Initial Cloud Hosting Fee of Twenty Four Thousand Seveh Hundred Fifty Dollars (\$24,750.00)
- 10.2 The Initial Fee shall be due and payable in the first year upon the later of execution of this Schedule or thirty (30) days prior to the commencement of the Services hereunder, and must be paid in full prior to the commencement of Services hereunder. For each subsequent year of the Initial Term and any Renewal Term, the applicable fee shall be paid in full at least thirty (30) days prior to the expiration of the current term.
- 10.3 The Initial Fee shall be fixed as set forth in this Agreement for the Initial Term, but the fee for any Renewal Term ("Renewal Fee") shall be as determined by Vision, which shall give Customer notice thereof not less than thirty (30) days prior to the expiration of the then-current Renewal Term.
- 10.4 Any Renewal Fee hereunder shall be due and payable in full not later than two (2) business days prior to the commencement of such Renewal Term.
- 10.5 Customer agrees to pay for Services provided at Customer's request that are not covered by, or are expressly excluded from this Schedule within thirty (30) days of receipt of an invoice therefor at Vision's then-current prices.
- 10.6 With Customer's prior approval and if travel is necessary to perform the Services herein described, Customer shall pay to Vision, within thirty (30) days of receipt of an invoice, all reasonable out-of-pocket expenses incurred by Vision in performing the Services for Customer under this Agreement, including but not limited to expenses for travel, meals, lodging and parts:

11 Termination; Suspension of Service

- 11.1 Customer shall have the right to terminate this Schedule upon Sixty (60) days written notice to Vision, provided that no such termination shall result in a refund to Customer of the Initial Fee or any Renewal Fee paid hereunder, nor shall it terminate the obligation to pay any remaining portions of the Total Initial Fee not yet invoiced.
- 11.2 Vision reserves the right to suspend the performance of Services under this Schedule if the Customer fails to pay the Initial Fee or any Renewal Fee within ninety (90) days of becoming due. During any such suspension, Services shall be restored once any outstanding Initial Fee or Renewal Fee has been paid in-full.
- 11.3 Any termination of the Agreement shall result in the immediate termination of this Schedule subject to the terms and conditions of the Agreement and this Schedule.
- 11.4 The termination of this Schedule shall be without prejudice to any rights of either Party against the other, and such termination shall not relieve either Party of any of its obligations to the other existing at the time of termination.



By signing below, each party acknowledges that it has read this Schedule and the Agreement to which it is attached, understands them, and agrees to be bound by their terms and further agrees that they are the complete and exclusive statement of the agreement between the parties, which supersedes and merges all prior proposals, understandings, and all other agreements, oral or written, between the Parties relating to the subject matter of this Schedule. This Schedule may not be modified or altered except by a written instrument duly executed by both parties.

FURTHER, each Party has full power and authority and has been duly authorized to enter into and perform its obligation under this Agreement, including Licensee's authority to enter into an agreement of this scope and duration, all necessary approvals having been obtained. The execution, delivery and performance of this Agreement by each Party shall not violate, create a default under or breach of any charter, bylaws, agreement or other contract, license, permit, indebtedness, certificate, order decree or security instrument to which such Party or any of its principles is a party or subject to.

In witness whereof, the Parties hereto have hereunto set their hands and seals as of their respective dates written below.

Customer:	Vision:
City of Norfolk VA	Vision Government Solutions, Inc.
810 Union St., Suite 303	1 Cabot Road
Norfolk, VA 23510	Hudson, MA 01749
Signature:	Signature:
By:	By:
Title:	Title:
Date:	Date:

EXHIBIT F



RFP 9230-0-2022/ML Computer-Assisted Mass Appraisal and **Land Records Management Software**

Issuing Office: Office of the Purchasing Agent Attn: Mia Lorenz 810 Union St., Suite 303 Norfolk, VA 23510 V: 757-823-4585 Mia.lorenz@norfolk.gov

Issued: November 1, 2021 RFP OPENING DATE AND TIME: December 13, 2021 2:00 p.m. Eastern Time

THE UNDERSIGNED AGREES TO PERFORM ANY CONTRACT AWARDED AS A RESULT OF THIS RFP, IN ACCORDANCE WITH THE REQUIREMENTS OF TERMS & CONDITIONS SPECIFIED HEREIN. THE SIGNATURE BELOW SHALL BE PROVIDED BY AN AGENT AUTHORIZED TO BIND THE COMPANY. FAILURE TO EXECUTE THIS PORTION MAY RESULT IN REJECTION OF THE OFFERORS PROPOSAL.

Offeror Legal Name:	
Virginia State Corporation Commission Number:	
Offeror Contact Name:	
Offeror Address:	
Offeror Contact Telephone Number:	
Authorized Agent Signature:	
Authorized Agent Name (Printed):	
Authorized Agent Title:	
Authorized Agent Contact E-mail:	
Authorized Agent Contact Phone:	
Date of Proposal:	

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SECTION I: PURPOSE, BACKGROUND AND SCOPE OF SERVICES

A. Purpose:

The purpose of this RFP is to obtain Computer Assisted Mass Appraisal ("CAMA") and Land Records Management Software for the City of Norfolk's ("City") Real Estate Assessor's Office ("REA"). The proposed solution may be either off the shelf or customized, but shall include installation, implementation, training, and ongoing maintenance and licensing.

B. Background:

The City REA provides both quarterly and annual reassessments, requiring multiple appraisal valuation tables, utilizing Data Cloud's ProVal CAMA software. The REA also serves as the foundation of the City's land records management, providing necessary data for all geographic-based City systems (GIS) through use of an in-house system. Land records include ownership, size and location, valuation, and taxability information for each parcel in the City. A separate system has been developed to track Tax Abatement programs, as well as Appraisal Appeals.

C. Scope of Services:

The selected vendor shall incorporate quarterly and annual reassessments as well as land records management into a single unified system that will also allow for the import and storage of historical data from the current system. The system must have the ability to provide multiple valuation tables, enabling updating of parcel records for both the quarterly supplemental assessment as well as annual reassessment activities for the upcoming year. Specifically, the system must be able to read separate valuation tables for current-year quarterly supplemental assessments as well as future valuation tables for the following year reassessment. This would best be accomplished through separate current year and reassessment records. Additionally, it shall include the following modules or capabilities:

- Import ownership information of the Clerk of Court System
- Provide access to deed imagery
- Import building permit information
- Export information to public websites
- GIS application
- Appeals module
- Tax abatement tracking
- Interface with all applications identified Attachment I

The Contractor shall provide an experienced professional services team that will implement the software working closely with counterparts from the City.

I. SYSTEM CAPABILITIES AND FUNCTIONS

Functionalities of the system shall include:

A. Capabilities

- 1. The required functionality of the system to be provided is set forth in Attachment I to this solicitation.
- The CAMA system shall store and display the data that is collected for each parcel on both screens and reports. The system shall support the creation and analysis of separate inventory and sales history data files, store and apply factors and values to calculate cost

- and sales comparison estimates of value, generate sales ratio reports and support maintenance activities such as parcel splits, building permits, transfers, etc. The system shall provide for the production of mailing labels.
- 3. The CAMA system shall support valuation data for residential, commercial, industrial, vacant land, condominiums, manufactured housing and exempt properties.
- 4. The CAMA system shall consider the pricing of additions and outbuildings by the cost approach, including adding appropriate depreciated values to the already "in place" assessed values in the system.
- 5. The CAMA system shall provide user-controlled edit features, including capability of updating cost tables, depreciation factors and market adjustments.
- 6. The CAMA system shall have inquiry capabilities on all parcel information by map lotsuffix, Geographic Parcel Identification Number, street address and owner's name.
- 7. The CAMA system shall include on-line screens laid out to the property appraisal card with logical groupings of data on the screen designed to correspond to data elements on the data collection card.
- 8. The CAMA system shall have the capability to build an independent sales file with independent access for research, as well as maintenance of multiple sales for multiple years.
- 9. The CAMA system shall provide a maintenance function producing audit trail listings and totals showing the before and after status of the data. It shall also show persons responsible and the date of the change.
- 10. The CAMA system shall have report writer capabilities to create a variety of independent reports as developed and required by the assessor by selecting some or all fields that can be sorted as needed and totaled. Property record printouts shall be on plain paper not pre-printed data collection cards.
- 11. The data files must be in a common PC format or alternatively, all data fields must be able to be imported or exported, quickly and easily, in an ASCII delimited format. Complete and accurate file definitions and layouts must be provided.

B. Reporting

- 1. The System shall be capable of providing at a minimum the reports specified in Section I.
- 2. The System shall provide standardized report writing tool(s) and the ability to extract data in Excel. Word, and Text formats.
- 3. The System shall allow the City users to create their own reports without engaging the
- 4. As part of System implementation, the Contractor shall create customized editable fields and reports as requested by the City.

II. **SYSTEM IMPLEMENTATION**

A. General

- 1. The Contractor shall fully develop, install, and implement the proposed system solution.
- 2. The System shall be fully operational at the Go-Live date determined by mutual agreement of REA, the City's Department of Information Technology ("IT") and the Contractor.

- 3. The City is open to a solution hosted by the Contractor, otherwise known as 'Software as a Service' (SaaS) or installed on the City servers. If the solution proposed by the Contractor is hosted, the software must meet the requirements included in Attachment H.
- 4. The Contractor shall follow an approved and integrated implementation process that incorporates the following phases:
 - a. Discovery Phase Contractor will conduct high level discussions introducing proposed project plan, resources, data sources, analytics, online tools, on-site and web-based technical services. On-site consultation is considered necessary for successful completion of the project plan.
 - b. Delivery Phase Contractor shall conduct at a minimum a needs analysis to assess and identify system gaps; suggest process improvements and create baseline configuration to support functionality of desired features and functions.
 - c. Configuration/Integration and Data Migration Phase Contractor will deliver a functional application with developed integration interfaces and complete the data migration/conversion process from legacy systems to the new data repository.
 - d. Validation and Testing Phase Contractor will ensure system meets the business needs of REA and can respond during high volume use in a robust and stable manner; Contractor will ensure system passes all operational and functional testing.
 - e. Training Phase Contractor will provide onsite training for departmental Subject-Matter-Experts (SMEs) and all users associated with the system in REA.
 - f. Go-Live Phase Contractor will provide a technical expert to be present when legacy system is permanently shut down and placed out of production to assist personnel and fix any issues that might arise.
 - g. Final Acceptance The acceptance period will consist of a minimum of sixty (60) consecutive calendar days, twenty-four (24) hours per day where all software shall operate without failure and be bug free.
 - h. Post Implementation Support Phase Contractor will provide desk-side and a solution-specific helpdesk to support operational and maintenance needs.

B. Data Migration

- 1. The Contractor and REA will determine the appropriate historical data required to be migrated from the old CAMA system to the new system during the Discovery Phase.
- 2. The City will deliver data from the CAMA system into a fixed-width text file format.
- 3. The Contractor shall be responsible for importing the data to be migrated into the new database such that it may be accessed with the new system without special tools or processes.
- 4. The Contractor shall perform testing and analysis of imported data to insure all required historical data is transferred successfully and is 99.99% error-free.
- C. Service Cloud Modules and System Capabilities (For Hosted Solutions i.e. "SaaS")
 - The service cloud modules and System shall include the United States Government cloud package which allows customers the ability to access systems based on the control requirements of the Federal Risk and Authorization Management Program ("FedRAMP") Moderate baseline. These systems are aligned with the U.S. Federal information security framework as defined by the Federal Information Security Management Act ("FISMA")

- 2. The hosted server shall be maintained by the Contractor, remain in the contiguous United States, and meet City IT standards (Section IV of this scope of work). All needed software, system updates, and patches shall be provided, maintained and installed by the Contractor. This server shall not be connected with City's computer network.
- 3. The System shall be a web-based system compatible with Windows 10 and shall be able to support HTML 5. The system shall be accessible via desktop computer, laptop computer, and handheld wireless devices. No additional software other than an internet browser shall be required for City staff to access and fully use the system and its components.
- 4. Data shall be stored in the United States for the duration specified in the appropriate retention schedules of the Library of Virginia, with recurring costs for storage to be borne by the Contractor. The Contractor shall have required amount of data storage needed to effectively handle anticipated volume under the Contract. The Contractor shall have relevant cyber liability insurance in place to pay legal damages and expenses if client data is exposed due to unauthorized access.
- 5. The Contractor shall install, configure, and maintain all application software and firmware required by the System. The System must allow access by a minimum of four hundred fifty (450) named users or a minimum of a minimum three hundred (300) concurrent
- 6. Industry standard software shall be utilized. Each such software shall be identified in the Contractor's proposal.

D. Database Requirements

For City-hosted solutions, the Contractor must meet the minimum City IT standard of Windows Server 2016, SQL 2016 and in Attachment H.

E. Project Staffing

- 1. The Contractor shall have a dedicated Project Manager assigned to this project to guide the implementation process through the Go-Live period. The Project Manager will work closely with the City's project manager for all activities associated with System implementation. This includes all activities and documentation associated with software, imaging and configuration, and installation. The Project Manager will prepare periodic written status reports and attend regularly scheduled project status meetings with REA, IT, and other stakeholders.
- 2. The Contractor's Project Manager will be responsible for coordinating all Contractor staff activities. They will ensure Contractor's staff follows all approved procedures and completes all assigned task in a timely, efficient and professional manner.
- 3. The Contractor's Project Manager, Lead Design Architect, Lead Developer and other personnel identified as such shall constitute Key Personnel.
- 4. The Contractor will not be permitted to reassign any of the Key Personnel, unless the City approves the proposed reassignment and the proposed replacement. The proposed replacement shall have experience and qualifications that meet or exceed the experience and qualifications of the staff they replace. If any of the Key Personnel must be absent for

- an extended period, the Contractor must provide interim Key Personnel, subject to the City's written approval.
- 5. The Contractor must submit any request to remove or replace Key Personnel to the City at least fifteen (15) calendar days in advance of the proposed action. The request must contain a detailed justification, including identification of the proposed replacement and their qualifications.
- 6. If any of the approved Key Personnel resigns or is terminated, the Contractor will replace the Key Personnel with an individual with qualifications and experience which meets or exceeds the experience and qualifications of the staff they replace, subject to the City's written approval.

F. Project Status Reports

To provide clear ongoing communications to stakeholders concerning the status of the project, the Contractor shall provide the City with a biweekly report containing sufficiently detailed information to enable the City to determine the status of the project and any variance from the detailed Project Plan, schedule or budget. The status report shall include, at a minimum:

- 1. Technical status of the project including Deliverable status, configuration status, and forecasted Deliverable status for the next reporting period.
- 2. Resource status for the project including staff utilization.
- 3. Schedule status for the project including task status, milestones completed, phases completed, schedule trends and schedule summary.
- 4. Comparison of actual versus scheduled percent complete for the work breakdown structure.
- 5. Issues, risks, and resource constraints which are affecting or could affect progress including the proposed or actual resolution.
- 6. Proposed changes to the project work plan, reasons for the changes, and City's approval/disapproval determination for any proposed changes.
- 7. Updated detailed project work plan with approved changes highlighted.

G. Training and Documentation

- 1. The Contractor shall provide end user and system administrator training for all functions of the System. This includes, but is not limited to, on-site training and support to enable staff with the knowledge to navigate and use the system, create reports, maintain system batch processing and perform system monitoring.
- 2. The Contractor shall perform separate training sessions, focused by job responsibility for end users, system administrators, and other support personnel as required by the City, with training materials provided in electronic format.
- 3. The Contractor shall perform training for City staff on-site.
- 4. All training must be completed no later than twenty (20) days prior to going live and is a prerequisite for the City's approval of going live.
- 5. The Contractor shall provide a user manual which includes step-by-step instructions for operation of each function provided by the System.
- 6. The Contractor shall provide a data dictionary describing each data column, table, and relationship contained in the database.

- 7. The Contractor shall provide documentation of each business process served by the System at summary, detailed, and technical levels.
- 8. The Contractor must provide additional training sessions (in-person or as a webinar) within fifteen (15) days of each software version change.
- 9. Within thirty (30) days after contract award, the Contractor shall submit to the City a Training Plan to define the approach and schedule for end-user and technical systems operation /configuration training.

H. Testing and Acceptance

A System acceptance plan, which is outlined below, is based on final acceptance of the entire System. This acceptance plan will be defined during the contract negotiation phase. Each Offeror must make a statement of agreement with the proposed acceptance plan in their proposal and propose an alternative wording for those paragraphs with which the Offeror takes exception.

- The acceptance period will consist of a minimum of sixty (60) consecutive calendar days, twenty-four (24) hours per day, and will begin at 8:00 AM on the first workday following "go live" on the System.
- 2. During the acceptance period, the System must remain fully operational, must operate without failure, must operate in conformance with the City's functional business requirements, and must operate with response times acceptable to the City. Failure shall be defined as an occurrence when the System is unable to meet standards and requirements outlined in the RFP.
- 3. If the System fails to meet any of the criteria above, the City shall notify the Contractor of such failure and the acceptance period starts over at 8:00 AM on the first workday following the Contractor's correction and completion of testing of the failure.
- 4. If the System fails to complete the sixty (60) day acceptance period twice, the City will reduce the amount of Contractor's final payment by 10% for each consecutive failed acceptance period.
- 5. The City will notify the Contractor in writing of the acceptance of the System when:
 - a. The performance standard is attained for the duration of the acceptance period.
 - b. The Contractor has completed all training requirements.
 - c. The Contractor has provided to the City all documentation and other deliverables.
 - d. All other acceptance conditions defined in the contract documents have been met.

III. SYSTEM SUPPORT AND MAINTENANCE

A. Ongoing Technical Support

- 1. The Contractor shall provide ongoing maintenance of all software, equipment, servers, hard and soft connections, communication network, and other elements.
- 2. The Contractor shall provide toll-free live English-speaking customer service telephone support during standard business hours (from 7:00am to 6:00pm Eastern Standard Time from Monday through Friday).
- 3. If an issue occurs within standard business hours, the Contractor shall address issues that can be fixed through remote internet access within one hour.

- 4. Under no circumstances may the System be down during business hours. Any maintenance, updates or other work shall be scheduled between 7:00 pm and 6:00 am or during the weekends.
- 5. The Contractor shall notify the City of any scheduled maintenance at a minimum forty-eight (48) hours prior to the time scheduled for maintenance.
- 6. Thirty (30) days before System Go-Live, the Contractor shall provide to the City a regular and preventive maintenance schedule to ensure optimal System performance.
- 7. Upon the City's request, the Contractor will also provide additional integration services with other City systems.

B. Escalation

The Contractor shall demonstrate an established process for addressing level one, level two, and level three problems.

- 1. Level One: Minor report or software irregularity such as spelling errors, font type or size.
- 2. Level Two: Software functions irregularity such as print or export menu not working.
- 3. Level Three: Software calculations wrong for money totals, set-off file error, billing file upload, hardware lockups, and data corruption or lost.

C. System Updates

- 1. The Contractor shall provide regular System updates to ensure that the System software, including all third-party software, shall be the manufacturer's "current" version. System updates performed by the Contractor shall consist of all actions necessary to ensure performance to specifications and minimize down time to software and associated hardware. The Contractor shall have ten (10) calendar days from the time an update or patch is released by the software manufacturer to process updates and patches in accordance with the requirements stated in the Software Maintenance section herein, except security vulnerability patches, which must be processed as soon as possible.
- 2. Maintaining the System to keep it up to date shall be included in software license costs.
- 3. Contractor shall provide error correction, updates and third-party software only after obtaining the written approval of the City.
- 4. Contractor shall submit to the City documentation of updates to reflect these software changes within ten (10) days of completion of the updates.
- 5. Contractor shall make new releases of third-party software available to the City at the City's option.
- 6. The Contractor shall support upgrades to its application based on operating system patch and upgrade requirements (for example, if the System runs on a Microsoft operating system, the software shall be patched according to the Microsoft patch and upgrade schedule without affecting usage of the application. If Microsoft decommissions a specific version of an operating system, the Contractor shall release a code compatible with next operating system upgrade prior to Microsoft ending support for current operating system, at no cost to the City).
- 7. Contractor shall provide corrective patches and upgrades to address discovered security vulnerability or System availability issues within ten (10) business days.
- 8. Copies of all software (and software updates/upgrades made during and after the warranty period) shall be provided to the City at the end of the warranty period.

D. Software Maintenance

For all components of the System (including the component equipment) covered under this Agreement, the Contractor shall provide software maintenance for the operating system, applications software, third party software and third-party tools, and database that was furnished and installed by the Contractor. Software maintenance shall include, but not be limited to, the following:

- 1. If the System does not meet the operational availability or function in accordance with the manufacturer's stated functionality and performance due to errors in software or any modifications thereto, the Contractor shall correct any such errors as identified by the City. Errors shall include, but not be limited to, flaws in operations and errors due to flaws in the design and coding of the System.
- 2. Upon notification of the error by the City or discovery of the error by the Contractor, the Contractor shall dispatch trained personnel to repair, replace and correct all malfunctions required for the System to perform in accordance with the manufacturer's stated functionality and meet the operational availability within twenty-four (24) hours from the date of notification. The Contractor shall provide documentation in machine-readable format, if any, relating to the error correction. The corrected software shall be tested by the Contractor in an off-line test environment. The Contractor shall then prepare a test and demonstrate to the City's satisfaction that the error has been corrected and submit it to the City for review and approval before the corrected software is installed into the production System. Such corrections to the software shall be provided at no additional cost to the City. The Contractor's obligations for the performance and completion of such error correction to ensure that the System and the associated equipment meets the operational availability and functions in accordance with the manufacturer's stated functionality and performance within the time provided above are of the essence of this Contract.
- If Contractor software maintenance causes and/or induces a failure, Contractor shall be financially liable for any costs incurred by the City and any revenue lost based on the average revenue per day.
- 4. The Contractor shall notify the City whenever they are planning to complete upgrades and/or enhancements to the operating system, the application software, third party software or third-party software tools used by the System, and after such upgrades and/or enhancements have been completed. Prior to performing the upgrades, the Contractor shall also provide the City with an analysis of the potential effects of such upgrades/enhancements on the System. This analysis shall include, at a minimum, the following:
 - a. Compatibility of the application software with the new operating system or thirdparty software;
 - b. Compatibility of the upgrade with the System architecture, server and communications infrastructure;
 - c. Infrastructure improvements required to support the upgrade;
 - d. Potential increases or decreases in equipment performance;
 - e. The availability of product support for the current (older) version of the operating system or third-party software; and
 - f. The cost of the software upgrade, including testing and any other tasks which may be associated with the upgrade.

The City will then determine whether to order the upgrade. If the City selects the upgrade, the Contractor shall perform the upgrade on the System, test the System, and update the documentation, all in accordance with the contract terms and conditions.

E. Testing

Prior to implementing any changes on the production system, the Contractor shall test the System in a separate development/test system environment to ensure that the changes are compatible with the application and other installed components.

The Contractor shall follow a consistent change control methodology to document System changes and approvals prior to implementation. Testing shall include, but not be limited to, the following activities performed by the Contractor:

- 1. Provide an acceptance test plan and procedures for City approval.
- 2. Backup the database before implementing new procedures.
- 3. Install all changes on a separate stand-alone off-line test environment.
- 4. Conduct pretests, and once testing confirms that the changes are compatible with the application and environment, then conduct testing and submit a test report. Depending on the magnitude of the upgrade, modification or change, the City may choose to witness testing. Once the test report is approved by the City, the Contractor shall plan with the City to schedule the changes to the production environment.
- 5. Complete a change management request form and obtain approval from the City before implementing the changes in the production environment.
- 6. Install the changes to the production environment and confirm with the City that the System operation is restored.

F. Management of Cyber Security Vulnerabilities

The Contractor shall monitor, evaluate, track, log, and immediately report to the City all cyber-security vulnerabilities or other vulnerabilities related to the software used. The Contractor shall work with the City to address any identified vulnerabilities and mitigate all security/malware/virus alerts.

G. End of Contract Transition

- 1. At the end of the Agreement, the Contractor shall transfer all documents and saved data to the City in a format acceptable to the City.
- The Contractor shall destroy all data related to this Agreement remaining in Contractor's
 possession after furnishing the data to the City and certify the destruction to the City in
 writing. Such destruction and certification will be performed at no additional cost to the
 City.
- 3. The Contractor shall assist the City as requested by the City in transitioning the services to the new provider.

H. COMPLETION CRITERIA

The City shall review Deliverables for compliance with Scope of Work requirements and specifications prior to acceptance and remittance of payments.

I. CURRENT TECHNOLOGY AND ENVIRONMENT

The City's Department of Information Technology (IT) reviews and updates the standards of acceptable and supported computers, printers, servers, network equipment, database management systems, telephony equipment, application systems and software on an on-going basis. Guidelines and preferred standards as of the issue date of this RFP are listed in Attachment H.

SECTION II: INSTRUCTIONS TO OFFERORS

A. Contact with City Staff, Representatives, and/or Agents:

Direct contact with City staff, representatives, and/or agents other than the Issuing Office staff on the subject of this RFP or any subject related to this RFP is expressly prohibited except with the prior written permission of the Purchasing Agent.

B. Offerors of Record:

Offerors receiving a copy of this RFP from a source other than the Issuing Office, should consult the Office of the Purchasing Agent's electronic bid service provider website https://secure.procurenow.com/portal/norfolk.

C. Questions and Addenda:

Offerors shall carefully examine this RFP and any Addenda. Offerors are responsible for seeking clarifications of any ambiguity, conflict, omission, or other errors in this RFP in writing. Questions shall be submitted through the Questions and Answers tab in the electronic solicitation posting for RFP No. 9230-0-2022 ML on https://secure.procurenow.com/portal/norfolk. If the answer materially affects this RFP, the information will be incorporated into an Addendum and posted on https://secure.procurenow.com/portal/norfolk. This RFP and any Addenda shall be incorporated by reference into any resulting Agreement.

Oral comments and/or instructions do not form a part of this RFP. Changes or modifications to this RFP made prior to the date and time of closing will be addressed by Addendum from the Issuing Office.

All questions shall be submitted no later than 5:00pm EST on November 8, 2021. Questions received after that time will not be considered. The answers to questions submitted will be provided in Addendum # 1 which shall be posted on November 15, 2021.

D. Offeror Obligation:

Offeror shall carefully examine the contents of this RFP and any subsequent addenda and inform itself fully of the conditions relating to services required herein. Failure to do so shall not relieve the successful offeror of its obligation to fulfill the requirements of any contract resulting from this RFP.

E. Anti-Collusion:

Collusion or restraint of free competition, direct or indirect, is prohibited. Offerors are required to execute the anti-collusion statement. See Attachment A.

F. Ethics in Public Contracting:

The Offeror shall familiarize itself with Chapter 33.1, Article VII (§§ 33.1-86 through 33.1-93) of the Code of the City of Norfolk, Virginia, 1979, as amended, entitled "ETHICS IN PUBLIC CONTRACTING," including the additional statutes set forth in § 33.1-86 theREAf, which are attached. The offeror shall abide by such provisions in submission of its proposal and performance of any contract if awarded. See Attachment B.

G. Nondiscrimination:

The Contractor agrees that it will adhere to the nondiscrimination requirements set forth in the Code of the City of Norfolk § 33.1-53, which will be incorporated into any contract awarded. See Attachment C.

H. Debarment Certification:

The certification regarding debarment, suspension, proposed debarment, and other responsibility matters attached to this RFP must be executed and submitted with proposals. See Attachment D.

I. Compliance with Federal Immigration Law:

The Contractor shall certify that, at all times during which any term of an agreement resulting from this solicitation is in effect, it does not and shall not knowingly employ any unauthorized alien. For purposes of this section, an "unauthorized alien" shall mean any alien who is neither lawfully admitted for permanent residence in the United States nor authorized to be employed by either Title 8, section 1324a of the United States Code or the U.S. Attorney General. See Attachment E.

J. Authorization to Transact Business in the Commonwealth:

Contractor shall certify that it is organized as a stock or nonstock corporation, limited liability company, business trust, or limited partnership or registered as a registered limited liability partnership and is authorized to transact business in the Commonwealth as a domestic or foreign business entity if so required by Title 13.1 or Title 50 or as otherwise required by law. See Attachment F.

K. Schedule of Events:

Event	Date
RFP Issued	November 1, 2021
Question Deadline	November 8, 2021
Addenda Issued	November 15, 2021
Proposals Due	December 13, 2021

L. Preparation of Proposals:

In presenting their proposals, offerors are encouraged to be thorough in addressing the specific requirements and scope of work and the Submittal Requirements set forth in Section IV. It is solely the offeror's responsibility to ensure that all pertinent and required information is included in its proposal. Failure to adhere to the format set forth in Section IV and to include the required information could result in a poor evaluation of the offeror's proposal. The City reserves the right to determine if a proposal is incomplete.

M. Proprietary Information/Non-Disclosure:

Offeror is advised that City Code § 33.1-9 and § 2.2-4342 of the Code of Virginia, 1950, as amended, shall govern public inspection of all records submitted by Offeror. Specifically, if Offeror seeks to protect any proprietary data or materials, pursuant to § 2.2-4342, Offeror shall: invoke the protections of this section prior to or upon submission of the data or other materials, provide a statement that identifies the data or other materials to be protected and that states the reasons why protection is necessary. Submit trade secrets, confidential documents or other proprietary information in a separate file clearly marked "PROPRIETARY". Each page should be identified as proprietary individually.

Information submitted that does not meet the above requirements will be considered public information in accordance with State statutes. References to the proprietary information may be made within the body of the proposal; however, all information contained within the body of the proposal shall be public information in accordance with State statutes. Trade secrets, confidential documents or proprietary information submitted by an offeror in conjunction with this RFP are not subject to public disclosure under the Virginia Freedom of Information Act ("VFOIA"). Information submitted that does not meet the above requirements will be considered public information in accordance with the VFOIA. An all-inclusive statement that the entire Proposal is proprietary and/or confidential is unacceptable. A statement that offeror's costs and/or proposal pricing are to be protected is unacceptable. Offeror will be requested to remove any such statement(s) in order to be eligible for further consideration.

N. Exceptions to the City's Contractual Terms and Conditions:

Offeror shall identify any exceptions to the City's Contract Terms and Conditions (set forth in Section III), including any proposed revision(s), and an explanation of why any such revision is needed. For each exception, offeror will specify the RFP page number, section number, and the exception taken. Offeror must not incorporate its standard contract document into its proposal, by reference or in full text, without listing each exception it represents to the terms and conditions of this RFP.

O. Proposal Binding for One Hundred Eighty (180) Days:

Offeror agrees that its proposal shall be binding and may not be withdrawn for a period of one hundred eighty (180) calendar days after the scheduled closing date of this RFP.

P. Cost incurred in Responding:

This RFP does not commit the City to pay any costs incurred in the preparation and submission of proposals or in making necessary studies or designs for the preparation theREAf, nor to procure or contract for services.

Q. Disposition of Proposals:

On receipt by the City, all materials submitted in response to this RFP will become the property of the City. All proposals shall be retained for official files and will become a public record after the award and subject to the Virginia Freedom of Information Act ("VFOIA") provisions.

R. Proposal Evaluation Process:

Evaluation of proposals will be within the discretion of the City. It is the intent of this RFP that all services be provided complete in all respects without need by the City to engage separate technical expertise of services. Upon receipt of the proposals, the City will evaluate all materials submitted by responding firms and rank the proposals using the following 100-point scale:

Criterion	Points
Experience in Providing Similar Services	15
Experience of the Project Team	10
Approach and Capacity	10
System Capabilities	25
Project Implementation	10
System Maintenance and Support	20
Pricing	10
TOTAL	100

Pricing will be evaluated objectively. The City will compute the points for pricing with the following equation:

> lowest total price/individual total price = X X(10)= number of points received for price

S. Presentations:

If, in the City's opinion, offeror presentations or demonstrations of the proposals are warranted, the City will notify the selected offerors. Such presentation or demonstration will be at a City site at a date and time mutually agreed to between the City and offeror. Travel will be at the offeror's expense.

T. Award:

The award of a contract(s) shall be at the sole discretion of the City. Award(s) will be made to the Offeror(s) whose proposal is determined to be most advantageous to the City, taking into consideration the evaluation factors set forth in this RFP. The City reserves the right to cancel the solicitation and to waive informalities. The City also reserves the right to enter into any contract deemed to be in its best interest, including the award of a contract to more than one offeror.

Offerors shall submit proposals, in accordance with the RFP requirements and maintain compliance with all federal, state and local laws and regulations. The City further reserves the right to make award(s) based on initial proposals submitted without further discussion of the proposals or deliberation. Therefore, the proposals should be submitted initially on the most favorable terms that the offerors can propose with respect to both price and technical capability. The contents of the proposal(s) of the selected offeror(s), as negotiated, will be incorporated and made a part of any City contractual obligation when the award(s) is made. Proposals will be initially evaluated on the basis of the written material provided, with clarifications requested as needed by the Office of the Purchasing Agent.

U. Protests:

Any offeror, who desires to protest the award or decision to award a contract, shall submit the protest in writing to the City's Purchasing Agent no later than ten (10) days after the award or the announcement of the decision to award, whichever occurs first. Public notice of the award or the announcement of the decision to award shall be given by the City, in the manner prescribed in the terms or conditions of the RFP.

No protest shall lie for a claim that the selected offeror is not a responsible offeror. Notwithstanding the requirements specified herein, the written protest shall be addressed to the City's Purchasing Agent and shall include the basis for the protest and the relief sought to be considered valid. The City shall issue a decision in writing stating the reasons for the action taken. This decision shall be final unless the offeror appeals within ten (10) days of receipt of the written decision by instituting legal action as provided in City Code §33.1-106. Nothing in this subsection shall be construed to permit an offeror to challenge the validity of the terms or conditions of the RFP. Pending final determination of a protest or appeal, the validity of a contract awarded and accepted in good faith in accordance with this chapter shall not be affected by the fact that a protest or appeal has been filed.

V. Cooperative Procurement:

The procurement of goods and/or services provided for in the resulting contract is being conducted pursuant to Virginia Code § 2.2-4304. Therefore, the successful offeror agrees that it will contract with any other public agency or body in the Commonwealth of Virginia who so desires, to permit those public agencies or bodies to purchase such goods and/or services at contract prices, in accordance with the terms, conditions, and specifications of this procurement. The successful offeror shall deal directly with each public agency or body seeking to obtain any goods and/or services pursuant to the resulting contract or from this procurement and in accordance with Virginia Code § 2.2-4304. The City of Norfolk shall not be responsible or liable for any costs, expenses, or any other matters of any type to either the successful offeror or the public agency or body seeking to obtain any goods and/or services pursuant to this cooperative procurement provision. Each entity shall be responsible for the administration of its individual contract with the successful offeror."

W. Equal Opportunity Business Development:

The City encourages small businesses and businesses owned by women and minorities and disabled veteran to compete and encourages non-minority firms to provide for the participation of small businesses and businesses owned by women and minorities through subcontracting, partnerships, joint ventures, and other contractual opportunities. All contractors are requested to complete Attachment G to provide the planned use of such businesses in fulfilling any resulting contract.

X. Method of Payment - Mandatory Acceptance of Electronic Payment:

All payments by the City under this contract shall be made by electronic funds transfer except as provided in paragraph a) of this clause. As used in this clause, the term Electronic Funds Transfer ("EFT") refers to electronic funds transfer and may include, at the Contractor's discretion, either "ACH" payments (bank transfers) or "ESP" payments (credit card payments).

- a) In the event the City is unable to release one or more payments by electronic funds transfer, the Contractor agrees to either:
 - i. Accept payment by check or some other mutually agreeable method of payment; or
 - ii. Request the City to extend payment due dates until such time as the City makes payment by EFT.
- b) Mandatory submission of Contractor's EFT information:
 - i. The Contractor is required to provide the City with the information required to make payment by EFT (see paragraph (d) of this clause).
 - ii. If the Contractor provides EFT information applicable to multiple contracts, the Contractor shall specifically state the applicability of this EFT information to each contract.
- c) Mechanisms for EFT payment. The City may make payment by EFT through either through:
 - i. the Automated Clearing House (ACH) network payment directly to the Contractor's designated account, subject to the rules of the National Automated Clearing House Association, or the Fedwire Transfer System, or
 - ii. ESP payments which involve use of a virtual credit card (16 Digit Single Use Card #) issued by Truist Bank (formerly SunTrust Bank) for accessing the funds.
- d) Forms to register for either type of electronic payment will be provided to the Contractor for completion prior to selection and must be completed prior to the issuance of a Purchase Order or award of any contract pursuant to this solicitation.

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SECTION III: CONTRACT TERMS AND CONDITIONS

TERM OF PERFORMANCE

The time of performance for System implementation shall be agreed upon with the Contractor through contract negotiations. The support and maintenance term of the contract shall commence upon System Acceptance and shall be for a period of five (5) years. After the Contractor's satisfactory completion of the five (5) year contract period, the City may, at its own discretion, renew this agreement for an additional five (5) years.

No work will be deemed complete until it is accepted by the City.

INSURANCE REQUIREMENTS

Contractor will maintain during the term of this agreement insurance of the types and in the amounts described below. All insurance policies affected by this agreement will be primary and noncontributory to any other insurance or self-insurance maintained by the City, and will be written in an ISO form approved for coverage in the Commonwealth of Virginia. Policy limits may be met via either a singular policy, or in combination with primary and excess, or umbrella, insurance policies. All policies will provide that the Contractor will receive at least thirty (30) days written notice in the event of cancellation of, or material change in, any of the policies. Unless otherwise specifically approved by the City, all general liability and automobile/vehicle liability policies will include the City of Norfolk, Va. and its employees as "Additional Insured", and be written as an "occurrence" based policy. If the Contractor fails to maintain the insurance as set forth in this Agreement, the City has the right, but not the obligation, to purchase such insurance at Contractor's expense

COMMERCIAL GENERAL LIABILITY INSURANCE ("CGL") with a limit of not less than \$1,000,000 each occurrence, \$2,000,000 general aggregate. CGL will cover liability arising from premises, operations, independent contractors, products-completed operations, personal injury and liability assumed under insured contract.

WORKER'S COMPENSATION INSURANCE providing coverage as required by applicable Federal and/or States' statutes, and Employer's Liability Insurance. The limits of such polices will be at least \$500,000 per accident/disease, and policy limit of \$500,000.

AUTOMOBILE/MOTOR VEHICLE LIABILITY INSURANCE with a limit of not less than \$2 million combined single limit; or, Bodily Injury \$1,000,000 each person, \$2,000,000 accident, and Property Damage \$100,000 each accident. Such insurance must cover liability arising from any motor vehicle as defined by Commonwealth of Virginia laws and must include coverage for owned, hired and non-owned motor vehicles, as well as uninsured and underinsured motorists.

CYBER AND PRIVACY LIABILITY INSURANCE with minimum limits of \$2,000,000 per claim and where personal data is accessible to contractor limits of at least \$5,000,000, and provides protection for, at least (i) liability incurred from alleged or actual theft, collection, dissemination, and/or use of personal or confidential information and any related forensic costs, crisis management costs, investigation costs; (ii) network security liability arising from the unauthorized access to, use of, or tampering with computer systems, including hacker attacks, ransomware attacks, or inability of an authorized third party to gain access to services, including denial of service, unless caused by a mechanical or electrical failure; (iii) liability arising from the introduction of a computer virus into, or otherwise causing damage to, a customer's or third person's computer, computer system, network, or similar computer-

related property and the data, software, and programs thereon; (iv) any government investigations, including regulatory defense costs resulting from the alleged or actual disclosure of personal or confidential information or network security liability event; (v) notification costs, and (vi) non-physical business interruption. Such insurance shall be maintained in force at all times during the term of the Contract and for a period of two years thereafter for services completed during the term of the Contract.

INSURANCE POLICIES/CERTIFICATE OF INSURANCE. Contractor will furnish the City with two (2) copies of the policies, or a certificate(s) of insurance evidencing policies, required above. The certificate(s) will specifically indicate that the insurance includes any extensions of coverage required above. In the event of cancellation of, or material change in, any of the policies, the Contractor will notify the City within at least 14 days after receiving notice of such cancellation or policy change and provide evidence that insurance coverage is in place to meet the requirements of this agreement. If the Certificate indicates coverage applicable insurance policies will expire prior to completion of all terms of this Contract, the Contractor will furnish a certificate of insurance evidencing renewal of such coverage to the City within 10 days of the effective date of such renewal. All certificates will be executed by a duly authorized representative of each insurer, showing compliance with the requirements of this Agreement. Failure of the City, and, or the City's designated agents for this Agreement, to (1) demand such certificates or other evidence of full compliance with these requirements, and, or, (2) identify a deficiency from evidence that is provided, will not be construed as a waiver of the Contractor's obligation to maintain the insurance required in this Agreement.

SUBCONTRACTOR'S INSURANCE. The Contractor will require each of his Subcontractors for work performed under this Agreement to take out and maintain during the life of the subcontract insurance coverage of the same type and limits required of the Contractor for work performed by the Subcontractor. Each Subcontractor will furnish to the Contractor two (2) copies of the policies, or certificates of insurance, evidencing the applicable insurance. The Subcontractor will comply with the same requirements regarding indications of coverage, renewal and submission of policies as is required of the Contractor. The Contractor will furnish at least one copy the Subcontractor's policies/certificates to the City.

INDEMNIFICATION

The Contractor shall indemnify and save harmless the City and its representatives from and against all losses and claims, demands, suits, actions, payments, and judgments arising from any act or omission of the Contractor, brought or recovered against the City and its representative by reason of any act, negligence or omission of the Contractor, its agents, servants or employees, in the execution of the contracted work, including any and all expense, legal and otherwise, incurred by the City or its representatives in the defense of claim or suit. This paragraph shall survive the expiration or termination of this Agreement.

APPROPRIATION OF FUNDS

Compensation pursuant to performance under this Agreement shall be subject to appropriation by the Council of the City of Norfolk. The City shall not incur any obligation or liability under this Agreement beyond the funds appropriated for such obligation or liability in any fiscal year in which this Agreement is in effect. Funds are certified for the first year of this Agreement. On or before of each succeeding Contract Year during the term of this Agreement, the Director of Finance shall certify the funds for that Contract Year. If such funds are not available and/or appropriated, the City may cancel the Agreement without incurring any liability and/or damages of any type to the Contractor. Any such cancellation may be by a written notice from the City to the Contractor.

PAYMENT OF SUBCONTRACTORS

The Contractor is obligated to take one of the two following actions within seven (7) days after receipt of amounts paid to the Contractor by the City for work performed by any subcontractor under this Agreement:

- a. Pay the subcontractor for the proportionate share of the total payment received from the City attributable to the work performed by the subcontractor under this Agreement; or
- b. Notify the City and the subcontractor, in writing, of the Contractor's intention to withhold all or a part of the subcontractor's payment with the reason for nonpayment.

The Contractor is obligated to pay interest to the subcontractor on all amounts owed by the Contractor to the subcontractor that remain unpaid after seven (7) days following receipt by the Contractor of payment from the City for work performed by the subcontractor under this Agreement, except for amounts withheld as allowed in subsection b., above. Unless otherwise provided under the terms of this Agreement, interest shall accrue at the rate of one percent (1%) per month.

The Contractor shall include in each of its subcontracts, if any are permitted, a provision requiring each subcontractor to include or otherwise be subject to the same payment and interest requirements with respect to each lower-tier subcontractor.

The Contractor's obligation to pay an interest charge to a subcontractor pursuant to this section may not be construed to be an obligation of the City. A Contract modification or Amendment to this Agreement may not be made for the purpose of providing reimbursement for such interest charge. A cost reimbursement claim may not include any amount for reimbursement for such interest charge.

FORCE MAJEURE

The Contractor shall not be held responsible for failure to perform the duties and responsibilities imposed by this Agreement if such failure is due to fire, riot, rebellion, natural disaster, emergency or disaster declared by the Governor or President of the United States, war, act of terrorism, or act of God beyond control of the Contractor, and outside and beyond the scope of the Contractor's then current, by industry standards, disaster plan, that make performance impossible or illegal, unless the solicitation calls for performance by the Contractor of emergency services or under emergency conditions or as otherwise specified in the Contract.

The City shall not be held responsible for failure to perform its duties and responsibilities imposed by this Agreement if such failure is due to fires, riots, rebellions, natural disasters, epidemics, pandemics, medical emergencies, other declared emergencies or disasters wars, acts of terrorism, or an act of God beyond control of the City that make performance impossible or illegal, unless otherwise specified in the Contract.

CITY OF NORFOLK BUSINESS LICENSES

The Contractor must comply with the provisions of Chapter 24 ("Licenses and Taxation") of the City of Norfolk Code, if applicable. For information on the provisions of that Chapter and its applicability to this Agreement, the Contractor must contact the City of Norfolk Business License Division, Office of the Commissioner of the Revenue, 810 Union Street, City Hall, First Floor, West Wing, Norfolk, Virginia 23510.

DEFAULT AND TERMINATION

If Contractor fails or refuses to perform any of the terms of this Agreement, including poor services, work or materials, the City may, by written notice to Contractor, terminate this Agreement in whole or in part. In addition to any right to terminate, the City may enforce any remedy available at law or in equity in connection with such default, and Contractor shall be liable for any damages to the City resulting from Contractor's default. The City further reserves the right to immediately obtain such work or services from other entities in the event of Contractor's default.

SUSPENSION OR TERMINATION OF AGREEMENT BY CITY

The City, at any time, may order Contractor to immediately stop work on this Agreement, and/or by thirty (30) days written notice may terminate this Agreement, with or without cause, in whole or in part, at any time. Upon receipt of such notice, the Contractor shall immediately discontinue all services affected (unless the notice directs otherwise), and deliver to the City all data (including electronic data), drawings, specifications, reports, project deliverables, estimates, summaries, and such other information and materials as may have been accumulated by the Contractor in performing this Agreement whether completed or in process (unless otherwise directed by the notice).

- A. If the termination or stop work order is due to the failure of the Contractor to fulfill any of its Agreement obligations, the City may take over the Work and prosecute the same to completion by contract or otherwise.
- Should the Agreement be terminated or work is stopped not due in any way to the fault of the Contractor, the Contractor shall only be entitled to compensation for services actually performed and materials actually supplied prior to notice of termination or to stop work and which are approved by the City and any applicable federal or state approving agency. No profit, overhead, or any other costs of any type are allowed after the date of such notice of termination or stop work order.
- C. The rights and remedies of the City provided in this Section are in addition to any other rights and remedies provided by law or under this Agreement and City may pursue any and all such rights and remedies against Contractor as it deems appropriate.

ASSIGNMENT

Contractor shall not assign, transfer, subcontract, or otherwise dispose of its rights or duties under this Agreement to any other person, firm, partnership, company, or corporation without the previous consent in writing of the City.

INDEPENDENT CONTRACTOR

Contractor shall at all times act as an independent contractor in the performance of this Agreement. Neither Contractor nor its employees or agents shall represent themselves to be, or be deemed to be, employees of the City.

SEVERABILITY

If any provisions of this Agreement are held to be unenforceable, this Agreement shall be construed without such provisions.

WAIVER

The failure by a party to exercise any right hereunder shall not operate as a waiver of such party's right to exercise such right or any other right in the future.

CHANGES

This Agreement may be amended only by a written document executed by a duly authorized representative of each of the parties.

GOVERNING LAW AND VENUE

This Agreement is made under and shall be construed according to the laws of the Commonwealth of Virginia. Venue, in the event of litigation, shall be in City of Norfolk.

ETHICS IN PUBLIC CONTRACTING

Contractor hereby certifies that it has familiarized itself with §§33.1-86 through 33.1-93 of the Code of the City of Norfolk, Virginia, 1979, as amended, entitled "Ethics in Public Contracting," and further that all amounts received by Contractor, pursuant to this Agreement are proper and in accordance therewith.

NONDISCRIMINATION

In the performance of this Agreement, Contractor agrees that it will adhere to the nondiscrimination requirements set forth in §33.1-53 of the Code of the City of Norfolk, Virginia, 1979, as amended.

DRUG FREE WORKPLACE

During the performance of this Agreement, the Contractor agrees to (i) provide a drug-free workplace for the Contractor's employees; (ii) post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the Contractor's workplace and specifying the actions that will be taken against employees for violations of such prohibition; (iii) state in all solicitations or advertisements for employees placed by or on behalf of the Contractor that the Contractor maintains a drug-free workplace; and (iv) include the provisions of the foregoing clauses in every subcontract or purchase order of over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.

For the purposes of this section, "drug-free workplace" means a site for the performance of work done in connection with a specific contract awarded to a contractor by the City, the employees of which Contractor are prohibited from engaging in the unlawful manufacture, sale, distribution, dispensation, possession or use of any controlled substance or marijuana during the performance of the contract. As a condition of continued service on the contract, any Contractor personnel assigned to this project may be required to submit to an alcohol/drug test at any time.

COMPLIANCE WITH FEDERAL IMMIGRATION LAW

The Contractor shall certify that, at all times during which any term of an agreement resulting from this solicitation is in effect, it does not and shall not knowingly employ any unauthorized alien. For purposes of this section, an "unauthorized alien" shall mean any alien who is neither lawfully admitted for permanent residence in the United States nor authorized to be employed by either Title 8, section 1324a of the United States Code or the U.S. Attorney General.

AUTHORIZATION TO TRANSACT BUSINESS IN THE COMMONWEALTH

Contractor hereby represents that it is organized as a stock or nonstock corporation, limited liability company, business trust, or limited partnership or registered as a registered limited liability partnership and is authorized to transact business in the Commonwealth as a domestic or foreign business entity if so required by Title 13.1 or Title 50 or as otherwise required by law.

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SECTION IV: PROPOSAL SUBMITTAL REQUIREMENTS

A. Proposal Submission:

Proposals shall be submitted electronically through the Office of the Purchasing Agent's electronic bid service provider website https://secure.procurenow.com/portal/norfolk. Proposals must be submitted before date and time due specified in the solicitation. Hard copy or e-mailed proposals, and/or late submissions will not be accepted.

B. Proposal Standards:

Proposal shall meet standards of professional writing established for the type of report or written material provided, shall be thoroughly researched for accuracy of content, shall be grammatically correct and not contain spelling errors and shall be submitted in a format outlined herein. Whenever possible, proposals submitted in response to this RFP shall comply with the following guidelines:

- Unnecessary attachments or documents not specifically asked for should not be submitted; and
- Proposals shall address the below areas, not exceeding the stated page limitations (if any).
 The proposal shall be limited to a page size of 8 ½" x 11", single space and type size shall not be less than 10-point font for each response item. If a page limit is not noted within the section below there is no page limit.

C. Unnecessarily Elaborate Responses:

Unnecessarily elaborate brochures or other presentations beyond those sufficient to present a complete and effective response to this RFP are not desired and may be construed as an indication of the respondent's lack of cost consciousness. Elaborate or expensive art work, paper, bindings, and visual and other presentations are neither necessary nor desired by the City.

D. Format of Proposals

Offeror shall respond to this RFP with a written proposal in the format outlined below. The proposal shall include, at a minimum, the following sections, each under separate tabs and in the order below:

Additional instructions are in Section II of this RFP.

- I. RFP Cover Page
- II. Experience in Providing Similar Services
- III. Experience of the Project Team
- IV. Approach and Capacity
- V. System Capabilities
- VI. Project Implementation
- VII. System Maintenance and Support
- VIII. Pricing
- IX. Contracting and Employment Outreach Plan
- X. Exceptions to the City's contractual terms and conditions
- XI. Attachments A, B, C, D, E, F, and G completed, signed or initialed as necessary

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XII. Appendix

Information required in each section.

I. RFP Cover Page:

Offerors shall complete and sign the cover page of this RFP and submit with proposal.

II. Offeror's Experience in Providing Similar Services

The Offeror shall provide examples of a minimum of three (3) and a maximum of ten (10) past projects where the Offeror has provided services for similar systems within the last five (5) years from the date of issuance of this RFP. Preference will be given to projects performed for governmental or non-profit institutions. Limit the number of pages to two (2) pages per project. At a minimum, Offerors shall provide the following information: name of an individual that can provide information regarding the quality of services provided by the Offeror; contact person's email address, and phone number; description of the services provided by the Offeror for the client; value of the initial system implementation project and the subsequent maintenance and support contract.

III. Experience of the Project Team

Offeror shall provide resumes and experience statements for Key Personnel members of the team, to include, at a minimum, the Project Manager and the Training Manager. Focus specifically on other similar projects. Describe how that prior experience relates to the position that the person will perform on this project. Indicate percentage of time the project team members will be assigned to this Project. Limit your response to 1 page per resume.

Offeror shall provide a project organizational chart and demonstrate whether team members have previously successfully worked together.

IV. Approach and Capacity

Offeror shall describe in detail how they intend to implement the system, from selection through installation to ongoing maintenance and operations. The description shall include, at a minimum: implementation milestones, specific installation steps, programming, replacement parts process, back-end system and remote management implementation, equipment warranty information, training plan, method/approach for credit card processing, and ability to add features.

V. System Capabilities

The Offeror shall provide detailed specifications and capabilities of the proposed software:

- Complete the technical requirements table included in this solicitation as Attachment I.
- Describe in detail how Offeror's software and service fulfill the City's project goals and statement of work.
- Describe in detail how the software works to meet the City's requirements. Include screenshots of specific examples.
- Describe in detail available or recommended options.

- Specify the minimum and preferred database hardware and software operating environment.
- Identify the browser language and version of software that will be used in the proposed system.
- Itemize all hosting, storage, retrieval, legacy data handling, ancillary services, and PCI compliance updates.
- Describe any proposed innovative options and methods which will provide cost savings and/or overall quality improvements to the services provided under the current systems.

VI. Project Implementation

The Offeror shall:

- Provide a complete project timeline including all major milestones.
- Describe in detail project planning, implementation, execution, and go-live.
- Describe in detail training schedule, goals, and what is to be accomplished when training is completed.
- Describe communication protocols between the Offeror and the City, and the process for addressing implementation and testing issues.
- Describe processes that will be used to test the integrity and compatibility of data.
- Provide a narrative Project Plan. The Project Plan must show all required tasks, which tasks are on the critical path, and how the tasks are to be accomplished. The following milestones shall be included:
 - 1. Delivery
 - 2. Installation and configuration
 - 3. Initial testing (testing out of the box)
 - 4. Initial conversion and testing (testing with City data)
 - 5. Full conversion
 - 6. Training
 - 7. Implementation
 - 8. "Go-Live"
 - 9. Final acceptance

The Project Plan must show who (individual or group) is assigned each task with a timetable for accomplishment. Offeror must clearly identify which tasks will be performed by the Offeror and which are the responsibility of the City. The Offeror shall include a description of the deliverables as they relate to the required tasks as specified in the Project Plan. The Offeror must include how the proposed payment schedule relates to the Project Plan.

• Provide a detailed transition and implementation plan timeline in Gantt chart (PDF format).

VII. System Maintenance and Support

- Describe in detail escalation process of addressing Level One, Level Two, and Level Three problems.
- Describe in detail software and hardware support during warranty period and after warranty period.
- Submit the proposed Service Level Agreement for system maintenance and support services.

• Identify life expectancy of the software and any other elements, and when would they be replacing each item/element under normal usage.

VIII. Pricing

- Provide itemized lump sum pricing for the implementation services, to include all labor, equipment, supplies, and travel necessary to successfully implement the system, and complete the required trainings.
- Provide itemized annual pricing for all available levels of support and maintenance plans offered for the first 5 years of the Agreement.

IX. Contracting and Employment Outreach Plan:

Provide a plan for workforce development and employment opportunities for individual residents of Norfolk, especially those of low to moderate income and identify strategies for subcontracting opportunities to small, minority and womenowned businesses.

X. Exceptions:

Identify any exceptions to the RFP or City's Contractual Terms and Conditions, including any proposed revision(s), and an explanation of why any such revision is needed. NOTE: a review of exceptions to the City's Contractual Terms and Conditions will not be performed during the evaluation of written proposal, and is therefore not part of the evaluation criteria for review of written proposals.

XI. Attachments:

Attachments A through G, completed, signed or initialed as required.

XII. Appendix:

Other documents that may assist the City in evaluating your proposal.

SECTION V: ATTACHMENTS										
ATTACHMENT A: ANTI-COLLUSION STATEMENT										
TO ALL OFFERORS: EXECUTE AND RETURN WITH PROPOSAL DOCUMENTS.										
In the preparation and submission of this proposal, on behalf of										
The undersigned offeror hereby <u>certifies</u> that this agreement, or any claims resulting there from, is not the result of, or affected by, any act of collusion with, or any act of, another person or persons, firm or corporation engaged in the same line of business or commerce; and, that no person acting for, or employed by, the City of Norfolk has an interest in, or is concerned with, this proposal; and, that no person or persons, firm or corporation, other than the undersigned, have or are interested in this proposal.										
Signature:										
Name:										
Title:										
Date:										
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ATTACHMENT B: ETHICS IN PUBLIC CONTRACTING

Sec. 33.1-86. - Purpose.

The provisions of this chapter supplement, but do not supersede, other provisions of law including but not limited to, the State and Local Government Conflict of Interests Act (Virginia Code, § 2.1-639.1 et seq.), the Virginia Governmental Frauds Act (Virginia Code, § 18.2-498.1 et seq.), and Articles 2 (Virginia Code, § 18.2-438 et seq.) and 3 (Virginia Code, § 18.2-446 et seq.) of Chapter 10 of Title 18.2 (related to bribery). The provisions of this article apply notwithstanding the fact that the conduct described may not constitute a violation of the State and Local Government Conflict of Interests Act.

(Ord. No. 33,095, § 1, 9-11-84; Ord. No. 34,573, § 2, 6-30-87)

Sec. 33.1-87. - Proscribed participation by public employees in procurement transactions.

Except as may be specifically allowed by provisions of the State and Local Government Conflict of Interests Act (Virginia Code, section 2.1-639.1 et seq.), no public employee having official responsibility for a procurement transaction shall participate in that transaction on behalf of the public body when the employee knows that:

- 1. The employee is contemporaneously employed by a bidder, offeror or contractor involved in the procurement transaction; or
- The employee, the employee's partners, or any member of the employee's immediate family holds a
 position with a bidder, offeror or contractor such as an officer, director, trustee, partner or the like, or is
 employed in a capacity involving personal and substantial participation in the procurement transaction,
 or owns or controls an interest of more than five (5) percent; or
- 3. The employee, the employee's partner, or any member of the employee's immediate family has a pecuniary interest arising from the procurement transaction; or
- 4. The employee, the employee's partner, or any member of the employee's immediate family is negotiating, or has an arrangement concerning, prospective employment with a bidder, offeror or contractor.

(Ord. No. 33,095, § 1, 9-11-84; Ord. No. 34,573, § 3, 6-30-87)

Sec. 33.1-88. - Solicitation or acceptance of gifts.

No public employee having official responsibility for a procurement transaction shall solicit, demand, accept, or agree to accept from a bidder, offeror, contractor or subcontractor any payment, loan, subscription, advance, deposit of money, services or anything of more than nominal or minimal value, present or promised, unless consideration of substantially equal or greater value is exchanged. The city may recover the value of anything conveyed in violation of this section. (Ord. No. 33,095, § 1, 9-11-84)

Sec. 33.1-89. - Disclosure of subsequent employment.

No public employee or former public employee having official responsibility for procurement transactions shall accept employment with any bidder, offeror or contractor with whom the employee or former employee dealt in an official capacity concerning procurement transactions for a period of one year from the cessation of employment by the city unless the employee, or former employee, provides written notification to the city manager prior to commencement of employment by that bidder, offeror or contractor. (Ord. No. 33,095, § 1, 9-11-84)

Sec. 33.1-90. - Gifts by bidders, offerors, contractors or subcontractors.

No bidder, offeror, contractor or subcontractor shall confer upon any public employee having official responsibility for a procurement transaction any payment, loan, subscription, advance, deposit of money,

services or anything of more than nominal value, present or promised, unless consideration of substantially equal or greater value is exchanged.

(Ord. No. 33,095, § 1, 9-11-84)

Sec. 33.1-91. - Kickbacks.

- No contractor or subcontractor shall demand or receive from any of his suppliers or his subcontractors, as an inducement for the award of a subcontract or order, any payment, loan, subscription, advance, deposit of money, services or anything, present or promised, unless consideration of substantially equal or greater value is exchanged.
- 2. No subcontractor or supplier shall make, or offer to make, kickbacks as described in this section.
- 3. No person shall demand or receive any payment, loan, subscription, advance, deposit of money, services or anything of value in return for an agreement not to compete on a public contract.
- 4. If a subcontractor or supplier makes a kickback or other prohibited payment as described in this section, the amount the REAf shall be conclusively presumed to have been included in the price of the subcontract or order and ultimately borne by the city and will be recoverable from both the maker and recipient. Recovery from one offending party shall not preclude recovery from other offending parties.

(Ord. No. 33,095, § 1, 9-11-84)

Sec. 33.1-92. - Purchase of building materials, supplies or equipment from architect or engineer prohibited.

Except in cases of emergency, no building materials, supplies or equipment for any building or structure constructed by or for the city shall be sold by or purchased from any person employed as an independent contractor by the city to furnish architectural or engineering services, but not construction, for such building or structure, or from any partnership, association, or corporation in which such architect or engineer has a pecuniary interest.

(Ord. No. 33,095, § 1, 9-11-84)

Sec. 33.1-92.1. - Participation in bid preparation; limitation on submitting bid for same procurement.

No person who, for compensation, prepares an invitation to bid or request for proposals for or on behalf of the city shall:

- i. Submit a bid or proposal for that procurement or any portion the REAf; or
- ii. Disclose to any bidder or offeror information concerning the procurement that is not available to the public. However, the city may permit such person to submit a bid or proposal for that procurement or any portion the REAf if the city determines that the exclusion of the person would limit the number of potential qualified bidders or offerors in a manner contrary to the best interests of the city.

(Ord. No. 43,223, § 2, 9-9-08)

Sec. 33.1-92.2. - Certification of compliance required; penalty for false statements

- 1. The city may require public employees having official responsibility for procurement transactions in which they participated to annually submit for such transactions a written certification that they complied with the provisions of this article.
- 2. Any public employee required to submit a certification as provided in subsection (1) who knowingly makes a false statement in the certification shall be punished as provided in section 33.1-95.

(Ord. No. 43,223, § 2, 9-9-08)

Sec. 33.1-92.3. - Misrepresentations prohibited.

No public employee having official responsibility for a procurement transaction shall knowingly falsify, conceal, or misrepresent a material fact; knowingly make any false, fictitious or fraudulent statements or

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representations; or make or use any false writing or document knowing it to contain any false, fictitious fraudulent statement or entry. (Ord. No. 43,223, § 2, 9-9-08) Sec. 33.1-93 Penalty for violation. Willful violation of any provision of this article shall constitute a Class 1 misdemeanor. Upon conviction any public employee, in addition to any other fine or penalty provided by law, shall forfeit his employment (Ord. No. 33,095, § 1, 9-11-84)	on,
State Law reference — Similar provisions, Code of Virginia, § 11-80. Sec. 33.1-94—33.1-100 Reserved.	
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ATTACHMENT C: NON-DISCRIMINATION

Sec. 33.1-53. - Employment discrimination by contractor prohibited.

Every contract over one thousand dollars (\$1,000.00) shall include or incorporate by reference the following provisions:

- 1. During the performance of this contract, the contractor agrees as follows:
 - a. The contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex, disability or national origin, except where religion, sex, sexual orientation, gender identity, national origin, age, disability, genetic information, marital status, political affiliation, whistleblower activity, parental status, military service or any other characteristic protected by federal or state law. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this non-discrimination clause.
 - b. The contractor, in all solicitations or advertisements for employees placed by or on behalf of the contractor, will state that such contractor is an equal opportunity employer.
 - c. Notices, advertisements, and solicitations placed in accordance with federal law, rule, or regulation shall be deemed sufficient for the purpose of meeting the requirements of this section.
- 2. The contractor will include the provisions of the foregoing paragraphs a, b, and c in every subcontractor or purchase order of over ten thousand dollars (\$10,000.00), so that the provisions will be binding upon each subcontractor or vendor.

(Ord. No. 33,095, § 1, 9-11-84; Ord. No. 39,912, § 1, 4-11-2000)

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ATTACHMENT D - CERTIFICATION REGARDING DEBARMENT, SUSPENSION, PROPOSED DEBARMENT, AND OTHER RESPONSIBILITY MATTERS

I. CERTIFICATION.

The offeror certifies, to the best of its knowledge and belief, that—

- (i) The offeror and/or any of its Principals—
 - (A) Are __ are not __ presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any federal, state or local agency;
 - (B) Have __ have not __, within a three-year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) contract or subcontract; violation of federal or state antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, or receiving stolen property; and
 - (C) Are __ are not __ presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any of the offenses enumerated in paragraph (a)(1)(i)(B) of this provision.
- (ii) The offeror has __ has not __, within a three-year period preceding this offer, had one or more contracts terminated for default by any federal, state or local agency.

"Principals," for the purposes of this certification, means officers; directors; City's; partners; and, persons having primary management or supervisory responsibilities within a business entity (e.g., general manager; plant manager; head of a subsidiary, division, or business segment, and similar positions).

II. <u>INSTRUCTIONS.</u>

- a. The offeror shall provide immediate written notice to the Contracting Officer if, at any time prior to contract award, the offeror learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
- b. A certification that any of the items in paragraph (a) of this provision exists will not necessarily result in withholding of an award under this solicitation. However, the certification will be considered in connection with a determination of the offeror's responsibility. Failure of the offeror to furnish a certification or provide such additional information as requested by the appropriate City purchasing official may render the offeror non-responsible.
- c. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render, in good faith, the certification required by paragraph (a) of this provision. The knowledge and information of an offeror is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.
- d. The certification in paragraph (a) of this provision is a material representation of fact upon which reliance was placed when making award. If it is later determined that the offeror/ PPEs knowingly rendered an erroneous certification, in addition to other remedies available to the City, the

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appropriate City purchasing official may terminate the contract resulting from this solicitation for default.

III. NOTICE.

This Certification Concerns a Matter Within the Jurisdiction of an Agency of the United States and the Making of a False, Fictitious, or Fraudulent Certification May Render the Maker Subject to Prosecution Under Section 1001, Title 18, United States Code.

Signature:	
Name:	
Title:	
Date:	

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ATTACHMENT E: COMPLIANCE WITH FEDERAL IMMIGRATION LAW

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The offeror certifies, to the best of its knowledge and belief, that -The offeror or any of its Principals at all times during which any term of the contract is in effect, (Please fill in with your enterprise's complete name) does not and shall not knowingly employ any unauthorized alien. For purposes of this section, an "unauthorized alien" shall mean any alien who is neither lawfully admitted for permanent residence in the United States nor authorized to be employed by either Title 8, section 1324a of the United States Code or the U.S. Attorney General.

II. **INSTRUCTIONS.**

- The offeror shall provide immediate written notice to the Contracting Officer if, at any time prior to contract award, the offeror learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
- b. A certification that any of the items in paragraph (a) of this provision exists will not necessarily result in withholding of an award under this solicitation. However, the certification will be considered in connection with a determination of the offeror's responsibility. Failure of the offeror to furnish a certification or provide such additional information as requested by the appropriate City purchasing official may render the offeror non-responsible.
- Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render, in good faith, the certification required by paragraph (a) of this provision. The knowledge and information of an offeror is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.
- The certification in paragraph (a) of this provision is a material representation of fact upon which reliance was placed when making award. If it is later determined that the offeror knowingly rendered an erroneous certification, in addition to other remedies available to the City, the appropriate City purchasing official may terminate the contract resulting from this solicitation for default.

NOTICE.

This certification concerns a matter within the jurisdiction of an agency of the United States and the making of a false, fictitious, or fraudulent certification may render the maker subject to prosecution under section 1001, Title 18, United States Code.

C:....

Signature:	·	 -
Name:		 _
Title:		 -
Date:		

ATTACHMENT F: COMPLIANCE WITH STATE LAW – AUTHORIZATION TO TRANSACT BUSINESS IN THE COMMONWEALTH OF VIRGINIA

I. CERTIFICATION:

Α.	The	offe	ror (Please	fill	in		•	enterpr				me)
	trar	sact bu	siness i	n the Cor	nmonw	/ealth			nat it is :le 13.1 o	_		uthorized	i to
	The	identifi	cation	number	issued	d to	offeror	by th	e State	Corpo	ration	Commissi	ion:
В.		gn busi	ness er	itity und	er Title	13.1	or Title	50 or	as other	wise re	equired	nwealth a by law s authoriz	hall

II. INSTRUCTIONS:

- a. The offeror shall provide immediate written notice to the Contracting Officer if, at any time prior to contract award, the offeror learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
- b. A certification that any of the items in paragraph (a) of this provision exists will not necessarily result in withholding of an award under this solicitation. However, the certification will be considered in connection with a determination of the offeror's responsibility. Failure of the offeror to furnish a certification or provide such additional information as requested by the appropriate City purchasing official may render the offeror non-responsible.
- c. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render, in good faith, the certification required by paragraph (a) of this provision. The knowledge and information of an offeror is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.
- d. The certification in paragraph (a) of this provision is a material representation of fact upon which reliance was placed when making award. If it is later determined that the offeror knowingly rendered an erroneous certification, in addition to other remedies available to the City, the appropriate City purchasing official may terminate the contract resulting from this solicitation for default.

Signature:	 	
Name:		
Title:	 	
Date:	 	

I.

ΑП

f yes, ple	ase check the appropriate category:		
	African American (male)	African American (female)	
	Hispanic (male)	Hispanic (female)	
	Asian American (male)	Asian American (female)	
	American Indian (male)	American Indian (female)	
	Eskimo (male)	Eskimo (female)	
	Aleut (male)	Aleut (female)	
	Other (male)	Caucasian (female)	
		Other (female)	
Disabled 'Pisabled 'Pisabl	Veterans. All prime contractors should ion of small, women owned, minority Name(s) of your Subcontractor(s)		ardir erans
Disabled 'Pisabled 'Pisabl	Veterans. All prime contractors should ion of small, women owned, minority Name(s) of your Subcontractor(s)	furnish the following information regar ousiness enterprises and disabled veter	ardir erans
oisabled ' Participat Proposed	Veterans. All prime contractors should ion of small, women owned, minority Name(s) of your Subcontractor(s)ed Minority Category of Subcontractor(s	furnish the following information regar ousiness enterprises and disabled veter) - please check appropriate category(ies African American (female)	ardir erans
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oisabled ' Participat Proposed	Name(s) of your Subcontractor(s) ed Minority Category of Subcontractor(s) African American (male) Hispanic (male)	furnish the following information regar ousiness enterprises and disabled veter) - please check appropriate category(ies African American (female)	ardir erans
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Disabled 'Pisabled 'Pisabl	Name(s) of your Subcontractor(s) ed Minority Category of Subcontractor(s) African American (male) Hispanic (male) Asian American (male) American Indian (male) Eskimo (male)	furnish the following information regardousiness enterprises and disabled veter observed and disabled veter observ	ardir erans
Disabled 'Pisabled 'Pisabl	Name(s) of your Subcontractor(s) ed Minority Category of Subcontractor(s) African American (male) Hispanic (male) Asian American (male) American Indian (male) Eskimo (male) Aleut (male)	furnish the following information regardousiness enterprises and disabled veter observed and disabled veter observ	ardir erans

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,	4.	Proposed Description of Project:
	5.	Proposed Total value of awards to all subcontractors:
	6.	Proposed Total Number of minority subcontracts awarded:
	If yo	u do not propose the use of any subcontractors, please check here: \Box
H.	_	NSTRUCTIONS The City encourages small businesses and businesses owned by women and minorities and

The City encourages small businesses and businesses owned by women and minorities and disabled veteran to compete and encourages non-minority firms to provide for the participation of small businesses and businesses owned by women and minorities through subcontracting, partnerships, joint ventures, and other contractual opportunities. All contractors are requested to provide information in its proposal response indicating the planned use of such businesses in fulfilling any resulting contract.

Current Technology Requirements and Environment Information

The City's Department of Information Technology (IT) updates the standards of acceptable systems and software on an on-going basis. Guidelines and preferred standards as of the issue date are listed below.

Hosted and Cloud-Based Applications and Databases

All datacenters for cloud-based or hosted applications and storage must reside within the contiguous` United States. City of Norfolk data shall not be stored outside the contiguous United States.

All City of Norfolk data used, input, updated or modified in the system is the sole property of the City of Norfolk and can be used by Norfolk staff or designated agents for any purpose.

Data hosted in cloud services must be accessible by standard web protocols such as REST and SOAP APIs.

Web applications must be certified to work with high encryption for HTTPS traffic and support only TLS 1.2 and higher encryption protocols.

Vendors should not install backdoor or administrative accounts on the servers, applications or databases without prior authorization and providing all credentials to the City IT Security staff.

No unchangeable hardcoded credentials shall be on applications. All credentials must be changeable by City staff at any time for any reason without negatively impacting application functionality.

Vendors must safeguard the provided credentials to any City or external system configured for the City and must not share the credentials with anyone else. Should vendor suspect the credentials are compromised, it must communicate this immediately to the City's point of contact.

Creation of Cloud services without IT involvement and approval in advance is discouraged and may not be supported. City of Norfolk staff have the right to disable or remove access to such services due to security concerns or compliance regulation violations.

All Cloud-based applications and data storage must be FedRAMP capable. Vendor must disclose if application is not FedRAMP capable.

Data at rest and in transit from hosted or cloud-based applications must comply with FIPS 140-3 or most current standard. It must also be compliant with all local, state, Federal and international regulations and guidelines appropriate to that data type.

Security of specialized data must conform to rules and requirement set forth by all relevant industry standards. This includes but is not limited to criminal justice information system standards including FBI and Virginia State Police requirements, and financial and credit card system standards including PCI and DSS.

Cloud-based applications must have a multi-factor authentication (MFA) feature that does not rely on security questions or email for the second verification. Vendor must disclose if application does not have MFA, or if MFA relies on security questions or email.

Applications must be in-compliance with security patches no later than thirty days from the most recent vendor-released patches.

Applications running Java must be in-compliance with security patches no later than ninety days from the most recent vendor-released patches.

Site to site Virtual Private Network (VPN) connections for cloud-based applications will be reviewed on a

case-by-case basis.

Application Standards:

Application software must not require a user to be logged onto the desktop to run and operate. Application software must run as a service account, restricted from interactive log-in, or use similar technology.

No hardware-based licensing keys are acceptable (examples: no dongles or USB licensing keys).

Applications should be running with the lowest privileges possible. Applications requiring users to have local administrative rights for standard functions are not acceptable.

The preferred client/server application development environment must meet our standards for supportability, compatibility, and security.

Applications that are not hosted are preferred to run on a virtual server in a VMware vSphere 6.5 environment and reside in the City's centralized data center.

The preferred web-enabled development standards are MVC, CSS3, JavaScript, and HTML5; other application specific tools are also used.

A web-based application must operate without browser or security (compatibility-mode) modifications.

Standard and preferred web browsers are Google Chrome and Microsoft Edge. Internet Explorer 11 is maintained for legacy application compatibility.

The preferred Geographic Information System (GIS) standard is Esri ArcGIS 10.6.1 for Enterprise and Desktop applications. Use of GIS REST services is encouraged.

The preferred version of Visual Studio is 2013 or higher.

Applications and third-party plug-ins that are prerequisites for applications must be maintained to current supported versions.

Alternative technical application environments may be proposed and will be considered on a case-by-case basis but are not guaranteed approval.

Any application to be installed must be listed in the agreement and must be vetted by Information Technology staff for licensing, security, and compatibility with other components on server or network.

If vendor remote access to the application or server is required, it must be conducted via the most current version of WebEx and should be recorded, both for training purposes and for forensics if needed. No Virtual Private Network (VPN) or RemoteApp access will be granted to non-City staff, regardless of location. A City staff member must be on the same conference call or access method and must be actively monitoring the work.

The final configuration for all applications, including platform and development language, are subject to the approval of the Chief Information Officer or designee.

Database Standards:

Preferred databases are Microsoft SQL Server 2016 Enterprise Edition in VMWare, or higher. SQL Server versions not supported by Microsoft or versions near end of support will not be permitted.

Databases and SQL instances may reside and operate on a virtual server, reside and operate on a server shared with other SQL instances, or may require dedicated server hardware. Vendors must specify the minimum and preferred database hardware and software operating environment in their proposals.

Last updated November 30, 2020 2

Alternative technical database environments may be proposed and will be considered on a caseby-case basis but are not guaranteed approval.

The final configuration of all new servers and databases, including their physical and logical placement, are subject to the approval of the Chief Information Officer or designee.

Server Standards:

The preferred web server standard is Microsoft Internet Information Server (IIS) and .NET, latest versions.

The preferred server operating system is Windows Server 2016 or higher. Versions not supported by Microsoft or versions near end of support will not be permitted.

The preferred server architecture is VMware. If there are technical reasons requiring dedicated servers, City of Norfolk Network/Database Administration staff can provide technical requirements.

All servers must be running the RSA SecurID GINA and all personnel with Administrator rights must be issued an RSA hardware or software token. Alternate multi-factor authentication could be used if it is managed and controlled by City of Norfolk's Network/Security staff.

All physical servers are preferred to reside in the City's centralized data center unless there are technical reasons requiring servers to be installed at other facilities. Alternative technical server environments may be proposed and will be considered on a case-by-case basis but are not guaranteed approval.

If vendor remote access to the application or server is required, it must be conducted via the most current version of WebEx and should be recorded, both for training purposes and for forensics if needed. No Virtual Private Network (VPN) or RemoteApp access will be granted to non-City staff, regardless of location. A City staff member must be on the same conference call or access method and must be actively monitoring the work.

The final configuration of all new servers and databases, including their physical and logical placement, are subject to the approval of the Chief Information Officer or designee.

Network Standards:

The network protocol is TCP/IP TLS 1.2 encryption protocol and higher.

Select models of Cisco brand ISR routers, Catalyst model switches, and 2800/3800 model wireless access points are standard.

Select models of Cisco voice and video network equipment are also standardized.

The local network topology is 10/100/1000/10000 Mbps switched Ethernet, running on CAT6 twisted pair copper cabling, 50 UM multimode or single mode fiber optic cable. The wide area/metro network has multiple connection methods, including owned/leased MetroEthernet over HFC or fiber-optic, Fast Ethernet and Gigabit Ethernet services at various shaped bandwidths, and a 10Gbps DWDM-based Institutional Network (I-Net).

Network Communications Standards:

All wired devices are located at facilities that are connected to the network on at least a cable modem using HFC/TLS services with minimum bandwidths of 1.5Mb upstream and 1.5Mb downstream and all are managed by the City. All others use a variety of communication bandwidths ranging from T-1 to OC-192 capacity.

Wi-Fi wireless devices use the IEEE 802.11 b/g/n/ac standards.

Broadband wireless devices use 4G Verizon Wireless CDMA standards. Unless specifically exempted by the City's technical staff, only embedded 4G Verizon Wireless CDMA modems are permitted on mobile devices that will operate on the City's private Verizon Wireless provided mobile network.

Storage Standards:

Centralized Storage Area Network (SAN) storage is available and preferred when appropriate. It consists of an 8Gbps Fiber Channel SAN attached to storage subsystem used for all mission critical storage systems and VMware storage.

There is a centralized enterprise class backup system which is located at the City's main data center and also provides redundant backup cloud storage.

Desktop/Laptop/Tablet Software Standards:

Standard operating system is Windows 10 Professional (version 1909) x64 or higher.

Currently devices running Apple iOS, Linux, or any version of Android operating systems, are not allowed on the City's network, but are acceptable for off-network purposes with the approval of the Chief Information Officer or designee.

Devices running currently-supported versions of Apple MacOS are allowed on the network for special-purpose use with the approval of the Chief Information Officer or designee.

Standard productivity suite is Microsoft Office 2016 Professional (Office 365) or higher. Other standard desktop software includes PowerBI (latest version), Nuance (latest version) for PDF reading/writing and WinZIP (latest version) for file compression.

Standard and preferred web browser is Google Chrome or Microsoft Edge. Internet Explorer 11 is maintained for legacy application compatibility.

Standard anti-virus software is the most current version of Symantec Endpoint Protection for devices running Microsoft operating systems and Sophos for devices running Apple Macintosh operating systems. All new application and database servers, workstations, laptops, tablets, etc. are required to operate with a copy of the appropriate anti-virus software.

Desktop/Laptop/Tablet Hardware Standards:

Standard hardware for business desktops, laptops and tablets is the latest model of Dell Optiplex computers. There are two levels of models for desktops and laptops, one for general use and one for developer/performance use.

There are various versions of ruggedized equipment in the environment, including Dell Optiplex, Getac, and Panasonic enterprise models.

Cybersecurity Standards:

The City currently uses Next Generation Threat Protection (NGTP) appliances for intrusion protection, firewall, web filtering and other cybersecurity functions.

An independent third-party risk assessment, vulnerability scan, and penetration test plan and procedure must be approved prior to implementation for all new projects for which applications/solutions will be public-facing (on premises or cloud-based). Third party, level of assessment and scanning, and test plan and procedure will be determined at time of contract.

9230-0-2022 ML RFP Real Estate Land Management Software ATTACHMENT I SPECIFICATIONS

In the table below mark Yes/No to indicate whether the solution proposed by the Offeror includes each of the identified features.

			Available		Not
	·	Standard	Custom	3rd Party	Available
ID	REQUIREMENTS			•	
	APPEALS				
	The solution can assign an auto-generated appeal ID number as well as				
1	provide a field for a user-defined ID number.				
	The solution can allow for development of customized appraisal reports in				-
2	response to an appeal.				
l	The solution can create an appeals workflow to assign various progress points		•		
	to each appeal. Progress examples include: initial call needed, informal appeal				
	filed, formal appeal filed, site visit, more research needed, hearing ready, etc.				
	The solution should send automatic reminders to appraisers of unfinished				
3	workflow items.				
	The solution can store, display and print all forms, letters, comparable sale				
	grids and any other documentation sent to a property owner or presented				
	during the appeal. This may be accomplished through an interface with a City				
	imaging system and associated with the correct parcel identifier. Letters and				
4	forms should be customizable if generated by the solution.			i	
	The solution can automatically populate the appeals and history records with		·		
5	information from the related accounts.				
	The solution can enable users to view comparable sale properties by user-				
	selected parameters and comparably assessed properties alone or with an				
	option of simultaneous viewing the subject property and three or more				
6	comparables.				
	For appeals other than Board of Review, the solution has the ability to track			-	
	multi-year appeals that need to remain active until completed. Each year				
	identified in the appeal must be linked to the values for that year.			1	
7					
	The solution can generate stipulation agreements, hearing notices and final				
8	orders, tracking the date printed and date mailed.				
	The solution includes a Board of Review appeal tracking module. This module				
9	is interfaced with the Assessor's application. The solution allows parcel identifiers to be entered for assessment and sales		-		
	comparables. It should auto-populated and summarize the related				
10	improvement square footages and other data and export that data and				
10	imagery into a uniformly designed PowerPoint presentation for use at			1	
	Appeals hearings.				
	The solution contains a tool that will allow the scheduling of hearing dates			<u>.</u>	
	and times. The number of appeals per time slot is user-defined. The solution is				
	able to generate a hearing docket and provide notices of hearing dates for				
11	appraisers and proprty owners.				
12	The solution can allow for manual entry of hearing dates and times.				
	For appeals other than BOR, the solution contains a tool that will allow for		-		
13	manual entry of hearing dates and times.				
	The solution has the ability to allow a call-in informal appeal to be entered,				
_ 14	routed and tracked to the appraiser to return the call.				

		Available		Not	
		Standard	Custom	3rd Party	Available
15	The solution has the ability to track certified tax history values, petitioner requested values, appraiser recommended values and Board ordered values.				
16	The solution provides fields that allow users to record and track the owner's response to letters referenced above. (e.g. Yes, No, Agree, Disagree, Continue to Board of Review, etc)				
17	The solution can give users access to all values and allows the user to determine which values are used to populate standard forms and letters.				
	APPRAISAL	·	,		•
18	The solution can enable user to apply multiple adjustments for the physical, functional, and economic obsolescence; location and market influence adjustments for factors that affect property values. Additionally, each adjustment can be identified with a explanation code. Each adjustment can be associated with a sunset date.				
19	The systems allows for appraisal activities within market areas (neighborhoods), submarkets (a collection of neighborhoods) census tract, or other user-defined areas. "Appraisal activities" may be defined is all activities (sales abalysis, mass calculations, etc.) available within the solution.		,		
20	The solution can identify different value components (e.g. market value, assessed value, land use value) and annually adjust each component separately.				
21	Must be able to store all Rate tables, adjustment & influences used to value property separately for each assessment year. Be able to use those stored data items for value corrections for the appropriate year.				
22	The solution can allow multiple building condition descriptions (E.g. Fair, Good, Average etc.)				
	The solution provides the ability to assess leasehold boathouses, mobile homes, airplane hangers, decks, carports, leased buildings, etc. under their own property account numbers, independent from the land on which these				
23	improvements might be located. The solution allows for additional classes beyond the base building quality				
24	classes established by standards such as Marshall & Swift.				
25	The solution derives building square footage from the sketch or may be entered manually.				
26	The solution allows user-defined building styles as well as the base styles defined in standards such as Marshall & Swift.				
27	The solution should provide a comparable sales approach that displays individual property characteristics for subject and comparable property, and auto-calculates individual and gross comparable property adjustments. The solution allows for export of comparable sales grid in report format (paper and digital).				
28	The solution can identify and value contiguous land with the same owner, allowing valuation as one parcel or economic unit.				
29	The solution provides a display of all calculation details that contribute to the built up cost value for residential and commercial structures, out buildings, yard items and improvement features.				

			Available		Not	
		Standard	Custom	3rd Party	Available	
30	The solution provides cost rates as well as depreciation tables for "single-wide", "double-wide" and "triple-wide" mobile homes. The depreciation tables for mobile homes should be independent of other improvement depreciation tables.					
31	The solution provides cost tables/rates from Marshall & Swift or another nationally recognized third party source with annual cost updates as a fully integrated tool.					
32	The solution can calculate a replacement cost new (RCN) and replacement cost new less depreciation (RCNLD) for all improvements/structures.					
33	Can import & store cost for all property types, structures, yard items, special use, & outbuildings data from external sources (such as Marshall & Swift cost handbook)					
34	The solution uses similar descriptive language as the cost handbook source.					
35	The solution can allow for adjustments or modifiers, either globally, or for each geographic area (cycle, neighborhood, city, etc.) or property type, with user-defined defaults and rules. The solution can allow for user-defined					
36	annual adjustments through an automated process. The solution can enable users to apply different depreciation amounts to different buildings on the same property and allow user override.	,				
37	The solution can allow the user to indicate when property characteristics are estimated.					
38	On each land record, the solution can store and calculate adjustment factors to be applied by percentage or by lump sum (such as corner, pad site, prime land, contaminated etc.).		-			
39	The solution can store land book calculations and values for at least the current year and five years back.					
40	The solution can separate the land component of a single parcel into specific land segments (homesite, low, wet, rolling, flat, etc.), each with its own value component.					
41	On each land record, the solution allows multiple sub-category identifiers per parcel, such as corner, pad site, prime land, contaminated, etc. Identifiers can then be linked to a value table, coefficient, or percentage adjustment.				·	
42	The solution can accommodate different units of measure for land value, including, square foot, front foot, acre, and number of homesites and has separate fields for each unit of measurement.					
43	The solution can Incorporate the development of land valuation models by all tracked land characteristic fields including but not limited to zoning, property type, location, and unit of comparison.					
44	The solution provides an automated approach to valuing land utilizing rate tables that can be set up on an acreage, square foot, front foot or site value basis either for a batch process for multiple accounts or for a single parcel.					
45	The solution can allow for the calculation of land values based on present use and using table-driven land values. The solution can track land by topography categories (low, flat, steep, wet					
46	etc.) with the ability to apply an adjustment factor specific to each topography category per parcel.					

	1	Available		Available		ble I N	
		Standard	Custom	3rd Party	Not Available		
	The solution can allow percentage adjustments to base land value tables to	Standard	Custom	Sidialty			
	reflect influences that may not be typical in the neighborhood (development	Ì					
47	issues, access)				i		
	The solution can allow percentage adjustments to land values on parcel-by-						
	parcel, line-by-line basis to reflect influences that may not be typical in the						
48	neighborhood (development issues, access).						
							
	The solution allows for calibration of cost to local market using modifiers						
49	based on style, location, area and other property/land characteristics.						
	Ability for a user to selectively mass-change items as a "bulk update," without						
50	violating business rules.						
51	Able to sync data for selected benchmarks or neighborhoods only.				1		
	The solution can allow adjustments at the improvement, land and property						
52	levels.				<u> </u>		
	The solution can enable users to move structure information for one or more						
	structures from one parcel to a different parcel. Various value approaches				}		
	applicable to each moved building follow building to new parcel. Pictures and sketches should follow structure information and values.						
53	sketches should follow structure information and values.						
	The solution can display all records associated with any parcel (e.g., land				İ		
	parcels, parcels with two homes, contiguously assessed parcels) and calculate						
	the overall value of all records while maintaining and displaying separate						
54	values.						
	The solution provides for the storage and retrieval of sketches with multiple	ļ					
55	sketch parts for multiple structures per property.				ļ		
	The Solution values improvements, yard items, special use, outbuildings						
56	according to percent (%) complete.						
	In each value approach, the solution has field(s) to capture and apply						
	appraiser's calculation of:						
	1) Functional Obsolescence	i	}				
	2) Economic Obsolescence						
57	3) Physical Obsolescence						
	The solution provides for the use of percentage modifiers to calibrate RCN to						
58	the local market.						
	Supports the ability for an appraiser to designate changes to a parcel for						
59	future batch updates, such as new construction that must be posted in future						
29	dates. Goal is to minimize trips to the field. The solution provides a value reconciliation process between all valuation						
60	approaches to derive the final reconciled value estimate.						
	The solution has a "default" valuation approach with an appraiser override	<u> </u>	 				
	feature where the user can select an alternate valuation approach in the						
61	reconciliation process.						
<u> </u>	The solution can support a value reconciliation process within the comparable	 	 				
l	sales approach and between other valuation approaches to derive final			-			
62	reconciled assessed value estimate.		1				
_ 	The solution can allow users to select either the cost approach, direct						
	comparable sales approach, the income approach or a combination of the						
63	three approaches to value for each property.						

			Available		Not
		Standard	Custom	3rd Party	Available
64	The solution can store adjusted sales prices represented by time trending; if the sale includes personal property, intangible or business value.				
65	The solution can allow the user to edit a sketch without the need to re-enter data. For example, the user needs the ability to add an addition to an existing sketch, without the need to redraw the original sketch.				
	The solution can batch export sketches (including notes, labeling, and improvement information such as floor, type, etc.) for each sketch part into an Esri native vector format that includes sketch attribute and location information. The location information can be used so that the exported Esri format vector data is both placed and rotated in the correct geographic				
66	location with the correct orientation.				
67	The solution has the ability to import sketch data from multiple sketch or drawing software programs.				
68	The solution can allow for sketches of large foot print and multi-story buildings.				
69	The solution can allow for the printing of the sketch as a separate page or included on the appraisal summary form.				
70	The solution provides a method to identify and catalog disassociated sketches, with the ability to purge. The user is able to copy a sketch from the catalog to a property account.				
71	The solution has the ability to enter a disassociated sketch for a property prior to segments being created. The solution can allow printing of the sketch for field verification.				
72	The solution provides a sketch application or integrates with a 3rd-party tool.				
73	The solution can allow the user to designate which sketch or sketches are used as a building footprint layer.				·
. 74	The solution can allow view-only access to sketches.				
75	The solution can allow the user to control the size and locations of dimensions, labels, annotations, and notes. The user is able to easily sketch irregular shapes (radius, circles, angles) for all structures and outbuildings. The user is able to place annotations in various sections of the sketch showing year built and is able to shade specific building areas, specify line widths, shading colors, etc. The user is able to use patterns such as diagonal lines, dots, etc. covering a selected area of the building.				
76	The solution can support multiple building sections and structures per property with full sketch and/or identification as to approximate location on property.				
77	The user has the ability to zoom in and out during sketching, editing and viewing.				
78	The solution provides full sketch drawing data entry and editing on a portable field device.				
79	Solution can value a building without a sketch based on user-entered total square footage.			-	
80	Customer self-service web portal allows unlimited sketches and photos per parcel.				

		Available		Not	
		Standard	Custom	3rd Party	Available
81	The solution can enable users to compute standard IAAO statistics for sales ratios; level of assessment, minimum and maximum values, variance, mean, median, standard deviation, coefficient of variation, average absolute deviation, coefficient of dispersion and price-related differential (PRD).		·		
82	The solution can allow provisional changes in a test environment to characteristics and underlying tables, with the ability to retain these test versions that can allow for review, editing and applying to the CAMA system.				
83	The solution is able to integrate with Spatialest AppraisalEst statistical modeling application and transformations of variables.				
84	The solution provides tools to assist in the calibration of cost and depreciation tables to the local market. Calibration tools must include land and building adjustments at a market area and neighborhood area level.				
85	The solution can enable the user to develop, apply, test, reverse or accept statistical valuation models to subject records of the same type, same location and with the same units of comparison.				
86	The solution can allow the user to incorporate time adjustments into sales and ratio studies.				
87	The solution can generate a standard ratio report by user specified criteria. (User specified criteria such as: sale date range, sales ratio range, verification codes, property class, neighborhood codes, etc.)				
88	The solution can calculate and display common units of comparison such as Value per Unit, Value per Room, Price per Square Foot. etc.				
89 90	Supports additive, multiplicative, and hybrid value model formats. The solutions allows for overrides of calculated value of either the total value			-	
91	or individual improvements. Separately assign building characteristics and year built date for additions (including second story additions).				
	COMMERCIAL APPRIASAL				
92	The solution allows the reassignment or redesignation of commercial uses of structures originally designated for residential dwellings and vice versa.				
93	The solution can import and store income & expense data from external sources.				
94	The solution can allow the valuation of income-producing property using the direct capitalization and gross rent multiplier method or gross income multiplier method.				
95	The solution can allow multiple income approaches such as direct capitalization and Gross Rent Multiplier and Gross Income Multiplier on one parcel.				
96	The solution supports an Apartment or Multi dwelling unit valuation calculator; including rent per unit type (Bed and Bath Count), other income, expenses, vacancy, collection loss, and capitalization rates.			-	
97	The solution can capture gross rent, vacancy and collection loss, miscellaneous income, and itemized expenses, for all property types,				

			Available		Not
		Standard	Custom	3rd Party	Available
	The solution provides for the development of models comprised of typical				
	income, expense, vacancy, collection loss and capitalization rate figures that				
	can be applied in mass to parcels based on user defined selection criteria.				
98					
	The solution provides the means to analyze data and calculate median and mean rent per unit of measure, expense ratios, market rents, vacancy levels,			ļ	
	gross income multipliers, and overall capitalization rates for any strata of				
99	commercial property.				
- 55	Multi-family property owners often charge a separate rent for parking spaces,			<u> </u>	-
	carports and/or garages. The solution is able to track these rents separately				
100	from the base unit rents.				
- 100	The solution can allow user to designate or assign each floor and/or building			 	
	section or building with a specific income approach or price per unit, or cost				
	etc. whether valued as an independent parcel or a member of a group of				ł
	parcels that make up an economic unit. Automates allocation of value to			ŀ	
101	individual parcels.		ļ		
					-
	The solution can allow user to designate or assign each building with a specific			1	i
102	income approach or price per unit, or cost etc. for multi-use properties.				
	The solution can store net or effective rentable square footage (leasable area)				
103	for a commercial property (e.g., office buildings)				
•					
	The solution can allow the valuation of commercial property using other				
104	methods such as discounted cash flow and the mortgage equity method.				
	The solution can enable the user to define, display and print, line by line, a				
	build-up of the income approach(es) and the build-up of the calibrated cost				
105	approach including the associated land value(s) for a single parcel.				
	The solution can enable the user to define, display and print, line by line, a				[
	build-up of the income approach(es) and the build-up of the calibrated cost				
	approach including the associated building and land value(s) of multi-parcel				İ
106	economic units.				
	The solution can allow for a deduction of personal property value, intangibles,				
107	and business value in all approaches to value.				
	EXEMPTIONS			· · · · · · · · · · · · · · · · · · ·	· · · · · · · · · · · · · · · · · · ·
	The solution can allow an exemption to be applied to a single or multiple				
108	accounts using a percent of value exemption or a fixed dollar amount.				
100	The solution can process all non profit and other exempt properties through			-	
	The solution can process all non-profit and other exempt properties through the assessment cycle (establish market/current use values) without				
109	generating a tax bill.				
110	The solution can allow for multiple exemption calculation types.				
	The solution provides a table-driven field that can identify the statutorily				
111	exempt accounts.				
	The solution can automatically stop or cancel a given exemption after a user	<u> </u>			
112	configured duration or expiration date.				
	Allow for partial exemptions based upon the percentage of qualifying use or				
113	value.				
	Designate between exemptions granted by classification or designation;				
	provide data fields for date of application, date of site visit and date of				
114	approval				

			Available	<u> </u>	Not	
		Standard	Custom	3rd Party	Available	
-	The solution can allow for user-defined reports to capture data associated			,		
	with taxing districts, parcels/accounts, assessed values, exemptions, Tax					
115	Abatement, etc.					
	The solution can identify/flag the property for review upon the occurrence of	,	i			
116	a potentially disqualifying event.					
	The solution can allow partial exemptions by a percentage or a specific dollar					
117	amount.					
440	The solution can incorporate necessary functionality to implement tax					
118	abatements.					
110	Can record base value and market value for parcels in the Tax Abatement					
119	program.					
120	The solution can track the beginning and end dates of special property				-	
120	exemptions. FIELD MAPPING AND DATA COLLECTION	<u> </u>				
					l	
	If no field data collection tool is available, the solution is able to fully integrate	-				
121	with and continue our use of the Woolpert Mobile Assessor field application.					
	On-line field edit logic is under the control of the systems administrator. The					
	administrator is able to set field-level security access based on user log-in.					
	Administrator can also be able to set required fields without extensive					
122	programming or vendor intervention.					
	The solution allows direct data transfers without requiring an intermediary			· · · · · · · · · · · · · · · · · · ·		
	conversion process or third parties in order to move field data off a field					
	device into the CAMA solution or vice versa. Solution can enable user to					
	establish a record set of property characteristics, images and sketches on a	•				
	field device (PDA, Laptop PC, Tablet Computer).				ľ	
123						
	The solution has a mapping component that allows the user to query , view,					
	flag and edit local CAMA and GIS information real-time directly on/from the					
124	map.		_			
435	The field mapping solution can produce optimized routes and corresponding			,		
125	turn-by-turn directions for multiple parcels.					
126	The field mapping solution can function with both a mobile connection and in a disconnected environment.	•				
120	a disconnected environment.				<u> </u>	
	The solution's field and office mapping components allow real-time thematic					
	mapping and dynamic labeling of any attribute in the CAMA system. For					
	example, the user can view parcel improvement grades as unique colors on					
	the map and if the grade is changed in the CAMA database, the map					
127	automatically reflects the change by changing the corresponding parcel color.		İ			
	On the mobile application, the solution can apply a flag "inspection complete"					
	with appraiser ID and date/time stamp when the inspector is at the parcel					
128	with a single mouse click or "button" push.					
	The solution can enable the user to export or download specified data or					
	images from CAMA and/or GIS databases to a field device (PDA, Laptop PC, or					
129	Tablet Computer).					
	Able to edit data in the field without record locking entire			-	-	
	downloaded/cached parcel set. Allows multi-user editing with conflict					
	management functionality in the event multiple users edit a parcel record at					
_130	the same time.					

		f	Available		Not
		Standard	Custom	3rd Party	Available
131	CAMA field solution allows dynamic access to query, view and update source data including map data when a connection is available, but still supports disconnected editing and mapping when no connection is available.				
132	Mobile solution runs on tablet, regardless of OS.			•	
133	Can "download" a day's inspection record set (parcels) as work for the appraiser.				
	GENERAL FUNCTIONAL REQUIREMENTS				
134	The solution can enable the user to query an account by number, name, situs address, mailing address, plat and Geo Code, or by the use of a wild card.				
135	The solution allows the appraisal of parcels for quarterly reassessment while allowing a future year reassessment simultaneously. Quarterly reassessment should utilize valuation tables for the current year while allowing the reassessment year to utilize valuation tables for the future reassessment.				
	The solution can calculate legally mandated files and reports to satisfy	-			,
136	archival requirements for the Land Book and assessment notices.				
137	Stores an audit history of events and previous data on all records.				
138	The solution provides a secure, auditable, and efficient method for batch uploading changes to property account Information from a data file, such as adjustment codes to properties; ownership/ address changes, notes on multiple parcels simultaneously; Zoning, tax district, lot size, jurisdiction from GIS or other County solutions (Auditor, Building Permits); & any other data field as authorized by the system administrator. Also is reversible by the system administrator.	·			
139	The solution can allow changes to occur by individual account or groups of accounts.			٠	
140	The solution provides a method to recalculate and correct values for prior years.				
141	The solution has user-defined "flags" and notification triggers for multiple purposes.				
142	Can document individual customer comments in the database as separate records. Able to categorize some notes as public, other private.				
143	The solution provides a computer-based training (CBT) program and user manuals that can be used for staff training for common functional topics.				
144	The solution can calculate and generate the assessment portion of the Land Book.				
145	The solution has a customer self-service tool that is web-based and IVR. The solution can allow customers to initiate name and/or address changes and if necessary, include a list of supporting documents required to complete the change.				
146	The solution has client-configurable screens available for external users that contain data from the database as well as images associated with tax accounts, and provide current data as well as historical data.				
147	Solution has digital dashboards for workers to see pending assignments. Allows managers to see summary of employees' work.				

			Available		Not
		Standard	Custom	3rd Party	Available
	Value notifications show the following data:			 	
	- Name and mailing address	1			
	- Situs address	1		i	
	- Abbreviated legal description	{			
	- Tax code area	}			
	- Prior year's and new year's values for all value categories, with breakdown	ļ			
	between land and building (e.g., market values, current use values and senior	j		l	ŀ
	exemption values, when applicable)	1			
148	- A total value that is the basis for the following year's taxes.				
	Solution includes a customer case management report or notification to	İ			•
	remind appraiser if an issue hasn't been resolved within X business days.				
149	<u> </u>				
4	The solution can support links to multiple digital photographs for each				
150	structure and each parcel.		<u> </u>		
454	Can take photos with mobile device and have them linked to the property	1			
151	record or building record automatically.				
153	The solution can allow digital images to be linked to and deleted from each			1	
152	structure individually or in batches.				
	The solution can allow for capture of any image, such as original application				
153	forms and supporting documentation that would be linked to the account.			!	
	The solution can edit history entries that are the result of data entry errors.				
	An audit trail can show that the history entry was corrected, when, by whom,				
154	and what the previous entry was.				
	The solution can support the preparation of Valuation Notice of assessed				
155	value electronically.				
	The solution can process estimates of total taxable value or projections of				
156	"what if" situations at any time of the year.				
	The solution can allow users to export all tables to various PC desktop				
157	applications in editable formats.				
	When the focus of the solution moves from one field to another, the exited				
	field will immediately check for proper data format rather than waiting until				
	the user saves the screen. For example, when the user types an alpha	ļ			
	character into a numeric-only field, then tabs to the next field, the first field				
	will immediately flag the problem for correction. Alternately, when the				
	record is saved, the cursor focus will automatically go to the first problem				
450	field, then tab progressively through the other problem fields.				
158 159					
1.00	Solution has the ability to flag a parcel or permit for revisit date.				
	The solution can support a workspace, or copy of the database, for staff to				
	work ahead on updating supporting and look-up tables for the next roll, and a		1	1	
160	process to update the current production database when it is unlocked.				
	The user is able to generate and print value notifications in-house and				
161	through an outside vendor.				
	The solution provides global update and upload capabilities for groups of				
		I		l .	ı

records that include common characteristics. The solution can also enable

Can assign each parcel in a market area and submarket area to a physical

user to finalize the values of selected groups of records.

inspection cycle for audit once each 6 years.

162

			Available		Not
		Standard	Custom	3rd Party	Available
	If necessary, the solution can retain all tax calculation information for				
164	individual accounts.				
	The solution allows the user to add user-defined notes and comments that				
	become part of the parcel's history. The notes are categorized based on user-				
	defined rules. Examples include notes from the assessment process, notes				
	from boundary line adjustments, notes relating to the market assessment of				
165	the property, etc.				
	The solution can keep all changes, notes and updates associated with the				
166	property with client control of which actions/updates to log.				
	The solution can capture all update activities and store them in the history of				
	a property, along with the dates of when each activity is updated. Examples				
	include but not limited to:				
	- Segregation				
	- Combinations				
	- Cancellations and supplements				
	- Name changes				
	- Address changes				
	- Revaluation of property				
167	- Changes to the abbreviated legal description				
	The solution can allow the user to inactivate and reactivate an account for				
	assessment purposes only (regardless of whether or not taxes or special	ŀ			
	assessment fees are still owed on the property). Active and inactive dates	ŀ			i.
460	need to be displayed prominently on the main parcel screen.				
168	The solution are named trace to tien biotechic information on institute fund				
169	The solution can permit users to view historic information on inactive/retired	!			
103	properties/accounts. The solution can allow the user to create custom valuation notices without				
170					
170	vendor / programmer assistance. Integrates with Norfolk Air, BasicGov Permitting, Laserfiche, PCI's myRevenue				-
	system, AppraisalEst, Clerk of Court systems and Tax Abatement system. PCI				
	integration should include, but not be limited to, statuses (tax, parcel),				
	valuation (assessments, abatements), transfers, situs addresses, legal				
	descriptions, ownership, effective dates, GPIN, and general parcel information				
171	with daily file generation.				
1/1	The solution allows a data file to be produced on command to be used as a				
	comparison tool to verify that the Assessor's Office's CAMA system and PCI's				1
	myRevenue System match in terms of total accounts, assessment values,				
	parcel status, effective dates, and other elements to be determined. The file				
	should be able to be generated in various formats using a selection criteria				
	chosen by the user before executing the creation of the file. (e.g. Only				
	include the most recent assessment value, or choose to include multiple				
•	assessment values based on the dates chosen by the user.) The data file			,	
	should be produced in common readable formats such as but not limited to				
172	TXT, XLXS,etc.				
- 	The solution can accommodate all State constitutional and statutory				
	assessment and reporting requirements, as well as Virginia Department of	1			
173	Taxation rule changes.				
1/3	Travation rule changes.	ì	l		<u> </u>

		<u>-</u>	Available		Not
		Standard	Custom	3rd Party	Available
	The solution allows a data file to be produced on command to provide to mail				
	vendor for printing and mailing. The file should include data elements such as				
	but not limited to Account Number, Owner Name, Owner Mailing Address,				
	Current Assessment + 2 Previous Years' Assessments, Legal Description, Tax				
	Rate, etc. The data file should be produced in common readable formats such				
174	as but not limited to TXT, XLXS,etc.				
1/4	The solution can support maintaining and processing multiple years of				
	property data (characteristics, valuation, cost tables, etc.) for at least the				
175	current and prior 6 years.		,		
	The solution allows authorized users to certify a new property value on a				<u></u>
176	mobile device after a new construction inspection is performed.				
	The solution can allow user to create neighborhoods of properties by user				-
	defined parameters, such as: property account number, geocode ranges, GIS				
	polygon, property type codes, building class, building style, etc And save				
177	data to a file for future analysis.				
	The solution provides online help for all levels of the solution, including:				
	general help screens, transaction help, data entry help, and help at the field				
178	level. Help features are available on disconnected field devices.				
179	Solution allows mass input of value overrides from an outside source.				
400	The solution has the ability to make value corrections as a work-in-progress				
180	pending an activation date.				
ŀ	The solution allows users to copy inspection data, sketches and parcel				
181	characteristics from one property account number to another or to multiple accounts.				
101	Customer self-service web portalto show property characteristics as of a				
182	previous date.				
	The solution provides the ability to recalculate values for a minimum of				
	three prior years based on changed property characteristics but utilizing				
	cost and land tables in place for that valuation year. We envision a separate assessment record for each quarterly update and annual reassessment.				
	Each of these records should be updatable in accordance with the valuation			1	
	tables assocciated with the specific year and quarter.				
183					
	The solution can allow the appraiser to - Search field device for parcel				
	characteristics, images and sketches in an inspection area using criteria				
	specified by the user. Gives user option to set nested sort order of search				
	output (e.g. By NH, by Geocode, by PAN) The solution can prompt the user				
	with selection criteria and sort order and identifies # of parcels in print run;				
184	then allows user to cancel or proceed with print run to generate hard copies of field sheets.				
104	The solution provides multiple fields to identify different property types			· · · · · · · · · · · · · · · · · · ·	
	(commercial, residential, industrial), etc., uses (property class codes), and				
185	classifications (taxable, exempt, etc.).				
	Solution allows user to build ad hoc queries & reports by any combination of				
	criteria with output exportable to industry standard programs (e.g. MS Excel,	C			
	XML, SQL database, MS Access), store the queries and share them with other				
186	users and teams.				

The solution can generate a "top 10" property owner list within a taxing district report, based on the owner's name, including aliases or "Also Known A A', or "Doing Busines As". The solution can handle recording returned correspondence (mail/email) using barcoding or other current technologies without using keyboard technology. The solution provides audit trails for the correction of current and prior years values. The solution provides at able to maintain unique identifiers for roll correction types. The solution can support hyperlinks to standalone scanned Images stored in other City databases/systems/file locations. The solution can support the scheduling of batch jobs at a specific date and time. The solution can allow for user-identified on-line viewing without access to update capabilities. (Security access profile for read-only users) The solution can allow for user-identified on-line viewing without access to update capabilities. (Security access profile for read-only users) The solution can allow printing and mailing of valuation notices of selected groups of properties or individual property accounts as many times as needed during an assessment year. Date of original notice drives appeal dates, regardless of reprints. The solution can allow the user to quickly read and write data between the assessment application and SPSS (or similar) software. The solution can allow the user to edit property groupings by removing or adding to the list, and saving these lists for future reference. The solution can allow the user to edit property groupings by removing or adding to the list, and saving these lists for future reference. The solution can allow the user to edit property groupings by removing or adding to the list, and saving these lists for future reference. The solution can allow solve the read of the proposed solution. Preferably, the solution can launch the associated file with a click on the hyperlink or field. The solution allow seers to search for accounts by owner name, Tax payer, do				Available		Not
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end of the string 'meyer' to generate results containing the string 'meyer' in the name field.		· · · · · · · · · · · · · · · · · · ·				
I 202 ' -	202	'meyer' to generate results containing the string 'meyer' in the name field.				
The solution administrator has the ability to define options (such as automatic		The solution administrator has the ability to define options (such as automatic				
recalculation, by specific time/date, etc.) for recalculation of all associated						
203 property records.	203					

			Available		Not
		Standard	Custom	3rd Party	Available
204	The solution can allow for batch import and export of data (using industry standard file types such as .xlsx, .mdb or dbf files) into or out of the CAMA solution, for all appraisal table data. The solution applies appropriate data validation rules and ensures the user has the security permission to transfer the data.				
205	The solution provides valuation calculation reports by property class, property type, submarket, neighborhood, that include the total assessed value and parcel count. Solution provides a further breakdown between new construction totals and market-based assessment changes.				
206	The solution provides automatic coding or flagging of parcels based on user- defined criteria that prevents a valuation notice from printing.				
207	When the user processes a change for a prior year's assessment, the solution can automatically change the corresponding tax information for subsequent years without additional manual data entry by the Treasurer's staff.				
208	The solution can permit users to view historic information and comment fields in their entirety regardless of account status.				
209	The solution can display and store an image of the value notification letter.				
210	The solution can allow adjustments to be applied in mass by using a "what if" calculation that allows the user to check the results and accept or reject the outcome.				
211	The solution allows the transfer of "What If" analysis entered in a Test database to the Production database.	_			
	GIS		<u> </u>		1
212	The mapping solution can export to .pdf and print/plot high quality standard size (Letter, Ledger, Tabloid) and large format D and E size maps.				
213	The solution can populate a feature class's (Esri versioned SDE geodatabase) attribute information with CAMA data (e.g. PIN) by associating a CAMA PIN and an ArcSDE polygon without re-typing the PIN.				
214	The solution can use different GIS datasets for identifying subject and comparable sales such as quality, condition, age, neighborhood, other influences, etc.				
215	The solution can include a well-documented database architecture and table structures that provide simple, secure access for GIS technicians.				
216	In real-time, the solution can derive and use area information from GIS datasets for valuation and display purposes. For example, as parcels are split and/or combined or GIS datasets are updated, the amount of attributes like buildable area or soil type within impacted parcel(s) are derived from GIS real-time.				
217	In real-time, the solution can derive and use information from GIS datasets for valuation and display purposes. For example, as parcels are split and/or combined or GIS datasets are updated, the value for attributes like zoning, tax code area, freeway noise, etc. for impacted parcel(s) are derived from GIS real-time.				

			Available		Noț	
		Standard	Custom	3rd Party	Available	
218	Solution is able to accurately calculate and allocate either percentage of parcel or total acreage after a segregation breaks the parcel into children.					
219	This solution can support native Esri raster and vector formats.					
220	The solution provides the ability for the CAMA system can view and query GIS information (e.g. GIS acres, CreateDate, EditDate, Acreage Verification, Shoreland/Tideland interest, Seg Source, etc.) about a parcel and the GIS system can view and query CAMA information (e.g. Situs Address, Owner/Taxpayer, Legal Description, Zoning, etc.)					
221	The solution can maintain synchronization between the CAMA database and the GIS database. For example, the user can be assured that parcels in the GIS database have a corresponding parcel in the CAMA database and parcels in the CAMA database have a corresponding parcel in the GIS database.					
222	The solution provides a direct connect to Arc (ESRI) products: import MSD, Arc Pro Project and [provide a URL link to ARC Online.					
223	The solution provides a mechanism for dynamically receiving a selected set of parcels and attributes from a GIS application.					
224	The solution provides a mechanism for dynamically passing a selected set of parcels and attributes to a GIS application.		-			
225	The solution can export to KML to send to title companies and other entities.			,		
226	The solution has an Office mapping component that allows the user to query, view and edit production and property characteristic database CAMA and GIS information real-time directly on/from the map LAND RECORDS					
227	The solution can store and display a full or abbreviated legal description					
228	The solution creates new property accounts due to new subdivisions for the future assessment year. For example, plats recorded prior to June 30, 2021 are segregated and assessed for 2021. Plats recorded after June 30, 2021 through June 30, 2022 are to be assessed for 2022.					
229	The solution can combine properties in an automated manner that requires minimal data entry by the user.					
l ¯	The combination transaction is recorded such that the parcel history can be					
230	easily reconstructed.				ļ	
231	Deactivation of parcel - Sometimes have an immediate need for possession and use agreement (temporary seg into a parcel to be used for eminent domain). Parcel is deactivated after it's converted to ROW.					
	The solution can allow the copying/pasting/moving of data (including photos and sketches) from a parent parcel to the descendant parcel(s) to be based on user-defined criteria or business rules. For example: User decides whether or not valuation flags, situs address, etc., should be copied/pasted/moved to the					
232	resultant parcel(s). The solution can interface in real time using a reference number with the Auditor's Imaging solution in such a way that a parcel's legal description in the					
233	solution is displayed from the recorded image and the user has the ability to edit the legal description if needed.					
234	Add/remove parcel and change ownership all at the same time.	L	l		<u> </u>	

			Available		Not
		Standard	Custom	3rd Party	Available
	The solution can allow for an unlimited number of properties to be combined.	_			
	(If not, please indicate the maximum number of properties that can be				
235	combined in a single combination process.)				
	PARCEL MAINTENANCE				
	The solution provides the ability to associate multiple contacts with a single				
236	account and their role (owner, tax rep, etc.).				
	The solution provides configurable functionality to alert the user if the				
237	ownership changes for selected programs.				
	The solution can automatically assign an ownership record number when				
238	creating a new owner.				
_	The solution can accept mailing or situs updates from external data files				
	which allows the user to edit the information manually using standard word				
239	processing functionality.				
	The solution can move associated document images, sketches, and photos				
240	when characteristics have been moved or copied to new parcels.	ŀ			
	The solution provides the ability to copy and/or move selected property				
	characteristics (either the land or improvements) from one property to one or				
241	more properties, or within the same account.				
271	Initial properties, or within the same account.			_	
	The solution provides the option to choose an existing real property account	ŀ			
	from which to automatically copy specific fields (such as legal description,				
242	map tax lot, code area, situs, etc.) when creating a new account.				
242	The state of the s				
242	The solution has an automated mechanism to create multiple new accounts,				
243	in bulk, for a new development.				-
244	The solution can allow the user to edit, add, change or delete building permit				
244	information.				-
	The solution can maintain a complete historical record of ownership, values,				
245	and taxes configurable by the client and can search for historical owners.				
245					
2.45	The solution provides a find and replace feature for mass corrections to	ĺ		•	
246	mailing addresses.				
247	The solution can track the history of mailing address changes.				
	The solution provides mailing address fields that meet domestic and				
248	international postal standards.				
	The solution provides a summary for all records associated with any parcel				
	(e.g., mobile homes and land parcels, parcels with multiple structures,				ļ.
	contiguously assessed parcels), while maintaining the individual records.				
249	contiguously assessed pareets), write maintaining the maintain records.				
250	Ability to work in past, future and current assessment year				
	The solution can allow the user to mass update data characteristics, notes,				
	permits, value information, etc. for groups of new subdivision accounts based				
251	on client-defined criteria or business requirements.				
	The solution can allow for situs addresses that are stored in the Assessors				
	application and associated with one or more buildings, with a primary situs				
252	address identified for each parcel.	<u></u>			<u></u>
	The solution can report properties with an exemption when an ownership				
253	change occurs.		<u> </u>		<u></u>
	For each owner name record, the solution has an associated field to track				
254	percent ownership relative to a Property Account Number.				

		* ×	Available	*···	Not
		Standard	Custom	3rd Party	Available
	The solution can allow the County user to indicate a primary situs address for	Standard	Custom	Sidiraity	71,41,415
255	each account.]			
	The solution provides a table of commonly used city, state and zip				
256	combinations that facilitates quick entry of these fields.				ĺ
	The solution can handle single-entry or mass-entry of address changes,				 -
257	specifically regarding many accounts with the same owner.				
	The solution can record the parcel maintenance transactions such that the	-			
258	parcel history can be reconstructed, including multiple parents.				
	The solution has a means to group accounts by a pre-determined common				ĺ
	data element such as: name, address, or other key data element the County				
259	may determine appropriate.				
	The solution can track the changes in names, and have it available for				
260	customer service representatives.				
	The solution is able to classify owners as: Owner, Buyer, and In-Care-Of, and				
261	store and cross-reference 'Doing Business As' (d/b/a) name for the owner.				
262	The name fields are large enough as not to require any abbreviating.				
	The solution can update (or create a method to update) the names and				
	addresses in/for other applications that rely on the new property tax solution				
263	Ifor the source of name and address.			·	
	The solution has a means to group accounts by a pre-determined common				
	data element such as: Name, address, UBI (Uniform Business Identifier), or			•	
264	other key data element the County may determine appropriate.				
l	The inquiry by name is a wildcard query, and can query against the three				
265	name fields - Owner, Buyer, and In-Care-Of-or Doing Business AS (DBA).				
	The solution can search by alternate ownership names to identify all				
266	properties owned by that taxpayer/entity.				
	The solution can allow an ownership number to be associated with multiple				-
267	property accounts.				
	PERMITS	× :	ri.		4 , " - *
	The solution can allow for the import of permit information from other				
268	applications.				ir
269	The solution can maintain history of all permits issued on a property.			-	_
	The solution has the ability to move or copy permits from one account to				
	another. The user is able to add, change or delete building permit				
270	information in the CAMA application.				
	The solution (at a minimum) has the ability to store building permit				
	information such as: - Date the permit was issued - Jurisdiction issuing the		ľ		
	permit - Permit number - Permit type, and accept permitting information				
271	from other sources.				
	REGRESSION		0.71 +	•	8 at
	The solution has the ability to use geographically weighted regression for both	Ţ	· · · · · · · · · · · · · · · · · · ·		-
272	residential and commercial property.				
	The solution can perform multiple regression analysis for residential and		-		
273	commercial property.	1			
	The solution can allow comparable sale prices to be adjusted based on			-	
274	coefficients produced by the regression analysis.	ĺ			
	1				

		Available		Not	
		Standard	Custom	3rd Party	Available
275	If regreassion is not provided by the solution, a proven track record of			-	
2/5	compatibility with AppraisalEst by Spatialest application.				_
	REPORTING				
276	The solution has the capability to enable the creation of custom reports.				
	The solution has the ability to produce forms or form letters en masse for a				1
277	selected group of accounts, or for an individual account.				
278	The solution can generate reports that allow management to forecast				
270	workloads, monitor workload status, and make assignments.				
	After applying mass adjustments, the solution can allow for user-defined				
	audit reports showing before and after market values and other criteria as				
279	determined necessary.				
	The solution has the ability to send queries and reports to printer, fax server,]			
280	e-mail client, or file in several application formats (Example: HTML, Acrobat,				
	Word, Excel, etc.).				
281	The solution has the ability to store static results of a query.				
282	The solution has a method of joining parcel attributes stored in the CAMA				
	database to Esri feature class.				
	The Report Writer solution can support the import of form files in standard				
283	graphic formats, such as PDF, JPG, TIF, WMF, TXT and EPS.				
284	The solution has the ability to view reports on-line with drill down capabilities				
	to the source record level as well as any scanned images.				
	The solution can support searching by multiple data elements simultaneously,				
	and support partial search strings or wildcards. The solution can allow for				
	searching, using common operations (>, <, =) and Boolean operators (AND,				
285	OR, NOT).				
286	The solution can support phonetic/Soundex searching of text fields.				
	The solution can produce error and warning reports that identify records with				
287	actual or potential valuation or data entry problems.	L		L	<u>i_</u>
	SALES VALIDATION AND ANALYSIS			*	
200	The solution provides a method to produce and analyze sales ratio statistics				
288	by user-defined groups of properties.				
	The solution can allow for the automated selection of comparable sales based				
	on either a statistical algorithm utilizing a set of user-defined criteria and/or a	!			
	user defined weighting algorithm. Either solution can include distance from				Ì
200	subject as a user-defined criteria. This solution allows user to design reports				
289	for standardized BOE appeal response.				
	The solution can track sales or ownership changes in the sales history file -				
200	capturing sale type, sale date, instrument (deed type), prior ownership ID,				
290	and comments.				
291	The solution can link multiple parcels which sold on one deed.				
วกว	The solution can summarize land, improvement, value and sales ratio data			,	
292	from multiple accounts included in one sale transaction.		 _		
	The solution can allow a user to make corrections and updates to the sales				
293	module on a per parcel basis or in batch.				
233					
	The solution can allow sales records to be exported into other applications				
	such as Access and in statistical software such as Excel, AppraisalEst, etc				

		- 	Available		Not
		Standard	Custom	3rd Party	Available
	The solution can maintain a sales history file with valuation capabilities that captures and freezes the property characteristics at the time of the sale, while supporting corrections (based on historical valuation tables) of property value and characteristics.		·		
	The solution can allow for manual edit of property characteristics in sales history file.				
295	The solution can add the assessed values for multiple parcel sales involved in a single transaction; the combined sale price and total of assessed values will be used singularly in sales ratio reporting and analysis.				
296	The solution can allow for systemic purging of sales records by date ranges, according to Virginia State law.				
297	The solution can allow sales in the sales history file to be flagged for source, validity codes, sale type, property type, and instrument (deed type), and qualified/disqualified state codes for the inclusion or exclusion of sales data in studies and reports and for the Virginia Department of Taxation Sales Ratio Study.				
298	The solution can allow recalculation of value at point of sale if subsequent to sale new information prompts appraiser to edit / correct sale record data to accurately reflect building or land data at point of sale.				
	SYSTEM DESIGN				
299	The solution has customizable levels of security. The solution security allows for the designation of required, recommended,				
300	and read-only fields according to system access. The solution can clearly display mandatory fields (different shading, color, or other mechanism).				
302	The solution can use Microsoft standard capabilities, such as copy, cut & paste, multiple windows open simultaneously, split screen, cascading, undoing complete edit changes, etc.				
303	The solution has a spell-checking function for memo and comment fields.				
304	The solution provides user-definable tool bars and menu options. These settings are specific to a user or a desktop, i.e., each user can have their own configuration. The solution can clearly identify for each property the method used to				
305	develop the assessed value.				
306	The solution has one screen where all related values (land, improvements and total values) are totaled by year by user-selected criteria. Examples include city-wide, district, submarket, neighborhood, property class, etc.				
	SYSTEM SUPPORT				,
307	The solution can allow an account or group of accounts to be "locked" and prevent recalculation of value once the lock feature is turned on.				
308	The application provides an automated process (e.g., web service) to update cost tables as needed.				
309	The solution can allow tables from the prior year to be copied and updated to the current year.			L	

			Available		Not
		Standard	Custom	3rd Party	Available
		012	0		
310	The solution can add user-defined cost tables without program modifications.				
	The solution produces a report listing all or selected portions of the cost				
311	tables and depreciation tables used for each valuation year.				
	Solution allows for multiple cost and depreciation tables based on effective				
312	age and/or grade, property type and location.				
	The solution will allow valuation tables to have overlapping start/end dates				
	dependent upon whether the appraisal is for the current year or				
313	reassessment year.				
	The solution can keep historical copies of all cost tables by assessment year in				
	at least two formats:				1
	1) Read Only				
314	2) Active (For correcting prior years values)				
	The solution provides an automated approach to valuing land, utilizing rate				
	tables that can be set up on an acreage, square foot, front foot, or site value				
315	basis by year.				
	After changes to any value related table have been made, the solution				
	requires the user to manually authorize its deployment to the database so			1	
316	that no value changes occur until approved by the user.				
	Upon user authorization, table changes can automatically recalculate all				
317	associated property records.				
	The solution allows the user to override automatic recalculation and apply				
318	updates at specified time.				
	The solution can enable users to view all tables on-line (on screen), or in				
319	printed form (e.g., land rate tables, land add on tables, cost tables, etc.).				
	TAX ACCOUNTING				
	The solution can allow the user to develop taxing districts and special				
	assessment districts, assign a unique code to each district using any				,
320	combination of letters and numbers is valid for the code.				
	The solution provides for each taxing district, an unrestricted number of				•
1	levying authorities and authority categories each with its own effective date				;
321	and value base.				
	WORKFLOW MANAGEMENT				
I	The solution can incorporate a workflow processing intelligence so that				
1	parcels can be assigned to an appraiser, a specified work group, or can be				
322	manually reassigned to different appraisers.				_
	Solution produces reports on appraisal productivity; how many appraisals				
	performed by appraiser, by appraisal type, by neighborhood, by date range,				
323	etc.				
	System produces BOE printed appeal packet, including photos, cover letter,				
324	sketches, etc.				
	Can send automatically generated letters to any property owner regardless of				
	the type of exemption either individually or in batches when exemption is				
325	about to expire.				
	Automatically assigns properties for inspection based on recent sale date,				
326	permits or customer request.				
	The solution can include a graphical tool that provides the ability to develop a				
327	workflow/process model with routing and control points.				
	The solution can include a graphical tool that provides the capability for				
328	simultaneous as well as sequential process flows.			L	

	•		Available		Not
		Standard	Custom	3rd Party	Available
	The solution workflow tool can trigger and log automated events such as form				
329	letters, correspondence, e-mail, account flags, etc.				j
	Workflow manages the full segregation/combinations and lot line				<u> </u>
	adjustments from the recording of official documents, creation of accounts,				1
330	map (GIS) updates, and valuation (CAMA).				
331	The solution provides automated workflow capabilities that are configurable.			-	
	The solution provides the ability for the client to identify workflow queues,				
	routing, notification, process indicators, and sign-off authority at defined]
332	control points with individual user-defined sorts and filters.				
i	The solution provides the ability to track and report the routing of predefined				
	processes and user-defined production performance measures.				-
333	<u> </u>	<u> </u>	<u> </u>		
	MISCELLANEOUS	r			
	The solution has the ability to receive applications and filings submitted				
334	online.				
	The solution can accommodate all State constitutional and statutory				
335	assessment and reporting requirements, as well as DOR rule changes.		,		ļ
	The solution provides the ability to create notes that can be attached to any				1
	record, and that can also be categorized by type, with customizable sorts,]
336	filters and displays.		<u> </u>		
227	The solution can support the scheduling of batch jobs (updates, reports,				
337	processes, etc.) to execute automatically at a specific date and time.		· · · · · ·		
338	The solution has the ability to post (import) values from a Utility value file				`
338	from the State. The solution provides an automated mechanism that allows the user with		<u> </u>	·	
	minimal manual data entry to calculate the appropriate railroad mileage				
	percentages, assign account numbers by property owner and tax code areas,				
	verify total assessed values by property owner and tax code area, and update				
339	the solution.				
	The solution. The solution provides an API to allow 3rd party software to query, view, and			1	
340	update the solution's database.				
	The solution has a test environment for training and testing. The test				
	environment will function in the same manner as the production database,				
l	and will allow employees to perform testing activities for training and cross-				İ
341	check purposes.				
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